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Hosiery/Legwear (Men's, Women's and Children's)

FAIRCHILD FACT FILE

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HOSIERY & LEGWEAR
(Men's, Women's & Children's)

Market Trends

The hosiery industry, which had enjoyed considerable stimulus in the market place from consumer interest in novelties, fashion and color in hosiery, was hit quite hard by the recession in 1982. However, 1983 brought considerable improvement in demand and this is continuing in 1984.

Overall shipments measured in pairs were up about 7% in 1983 compared with 1982. Not all segments shared in the gain, however. Infants' and children's hosiery continued to slide from a 1981 peak in shipments; foot socks, too, were generally weak. However, shipments of anklets registered a very strong gain (up 31%) in 1983 compared with 1982, and women's pantyhose gained over 7%.

A reviving economy plus industry promotions of a broader selection of styles, textures, colors and the use of designer names and other eye-catching advertising themes have helped lift consumer spending from the 1982 doldrums. The holiday and resort selling seasons, 1983-1984, were reported in the trade press to be very strong. The growing importance of increasingly sophisticated consumers interested in, and able to afford, a legwear wardrobe, with a variety of styles and colors, augers well for the balance of this year.

Legwarmers, which had done well in 1982 counter to the general trend in hosiery, were reported to be off in demand in the better stores, but doing better in discount houses and mass merchandisers.

Manufacturers of upscale athletic socks have stepped up marketing and merchandising efforts behind branded lines to be sold through department stores, as this market is seen as having good growth potential. In the first six months of 1983, according to a study by Market Research Corp. of America (MRCA), overall sales of athletic socks were up almost 20% in terms of pairs, over 45% in dollars. Specialty and athletic footwear stores specializing in high performance, more expensive athletic hosiery and department stores with upscale lines shared in this gain.

In women's hosiery, most firms are now offering their largest and most diversified collections ever, and are also offering new incentive programs for retailers. Private labels are getting increased attention from retailers in bodywear, while many are narrowing their selections of designer names.

GENERAL INDUSTRY STATISTICS

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent covering the year 1977. During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Based on estimates resulting from the 1981 Annual Survey of Manufactures (reported in 1983), the value of all products shipped by the hosiery industry plus other receipts (called "industry shipments") rose 7.8% compared with 1980.

GENERAL INDUSTRY STATISTICS

Hosiery, Total (SIC 2251 & SIC 2252*)

	1981	1980	1977	% Change 1981/1977
Number of companies	na	na	528**	--
Number of mills/business locations	522	540	615	- 15.1%
Number with 20 or more employees	368	373	376	- 2.1
Employees, total (thous.)	60.5	62.4	58.8	+ 2.9
Production workers (thous.)	52.4	54.4	52.8	- 0.7
Payroll (mil. $)	$ 593.1	$ 568.2	$ 410.0	+ 44.6
Value added by manufacture# (mil. $)	1,246.3	1,149.7	858.5	+ 45.2
Value of industry shipments## (mil. $)	2,598.9	2,411.5	1,792.5	+ 45.0
Capital expenditures, new (mil. $)	55.3	49.9	31.4	+ 76.1

Women's Hosiery, Including Tights (Except Socks) (SIC 2251*)

	1981	1980	1977	% Change 1981/1977
Number of companies	na	na	176	--
Number of mills/business locations	160	172	200	- 20.0%
Number with 20 or more employees	117	123	119	- 1.7
Employees, total (thous.)	29.6	30.1	26.6	+ 11.3
Production workers (thous.)	25.4	26.3	23.8	+ 6.7
Payroll (mil. $)	$ 289.5	$ 277.8	$ 191.3	+ 51.3
Value added by manufacture# (mil. $)	708.9	654.6	457.0	+ 55.1
Value of industry shipments## (mil. $)	1,304.5	1,218.6	871.2	+ 49.7
Capital expenditures, new (mil. $)	22.6	27.8	16.6	+ 36.1

Hosiery, nec (SIC 2252*)

	1981	1980	1977	% Change 1981/1977
Number of companies	na	na	382	--
Number of mills/business locations	362	368	415	- 12.8%
Number with 20 or more employees	251	250	257	- 2.3
Employees, total (thous.)	30.9	32.3	32.2	- 4.0
Production workers (thous.)	27.0	28.1	29.0	- 6.9
Payroll (mil. $)	$ 303.6	$ 290.4	$ 218.7	+ 38.8
Value added by manufacture# (mil. $)	537.4	495.1	401.5	+ 33.8
Value of industry shipments## (mil. $)	1,294.4	1,192.9	921.3	+ 40.5
Capital expenditures, new (mil. $)	32.7	22.1	14.8	+120.9

na - not available
nec - not elsewhere classified

(footnotes continued)

GENERAL INDUSTRY STATISTICS

(footnotes from previous table continued)

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC) determined by the principal product made. The hosiery classifications comprise all mills primarily engaged in knitting, dyeing or finishing hosiery. SIC 2251 covers mills making women's full-length and knee-length seamless and full-fashioned hosiery, pantyhose and tights.

SIC 2252 covers mills engaged in knitting, dyeing or finishing infants' and children's hosiery, men's and boys' hosiery, socks, slipper socks and all other types of hosiery not included in SIC 2251.

**Represents the 1977 enterprise industry category. (See 1977 Enterprise Statistics, U.S. Bureau of the Census ES 77-1).

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by other manufacturers, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes receipts for contract work and miscellaneous receipts as well as the value of shipments of both primary products and secondary products made by manufacturers in these industries. The value of primary product shipments (hosiery), alone--plus the value of shipments of hosiery by mills classified in other industries who make hosiery as secondary products--is covered in product shipments on pages 11 & 12.

Source: U.S. Bureau of the Census, 1977 Census of Manufactures; Annual Survey of Manufactures, 1980, 1981. (Data on number of mills, 1980, 1981, are from County Business Patterns.)

The National Association of Hosiery Manufacturers, Charlotte, N.C., compiles statistical information on the hosiery industry based on reports received regularly from knitting mills producing a majority of all the types of hosiery made in the United States. These reports reflect the trends which are the important guides to the hosiery industry and its market.

Added to the amounts actually reported are estimates representing the balance of the industry's activity, to arrive at industry-wide data. The NAHM figures do not include non-knitting companies, such as commercial dyers and finishers, converters, etc.

GENERAL INDUSTRY STATISTICS

Number of Hosiery Companies, 1980-1983
(As of End of Year)

Year	Total	Women's*			All Other**		
		Total	North***	South	Total	North***	South
1983	292	92	22	70	207	13	194
1982	295	92	22	70	210	13	197
1981	302	93	23	70	216	14	202
1980	322	103	29	74	226	16	210

Number of Hosiery Mills (Plants), 1980-1983
(As of End of Year)

Year	Total	Women's*			All Other**		
		Total	North***	South	Total	North***	South
1983	415	146	25	121	269	22	247
1982	417	146	25	121	271	22	249
1981	427	147	26	121	280	23	257
1980	445	156	31	125	289	25	264

* Covers hosiery, pantyhose, socks, etc., knit on 300 needles or more for women and girls, size 7 and up. (Some companies are included in both columns * and **).

** Covers hosiery knit on less than 300 needles for infants and children (size 3-8½), for girls, boys and women (size 8-11); for men (size 10 and up).

*** North includes the midwest and far west.

Source: National Association of Hosiery Manufacturers, 1983 Hosiery Statistics (50th Annual Report)

Employment & Earnings

Employment in the women's hosiery industry gained in 1983, rising 6.0% over the 1982 total and 5.3% over the 1981 total. The 1983 employment average of 33,500 in women's hosiery industry, however, was well below the peak of 35,500 reported in 1974.

In other types of hosiery, mainly men's hosiery, 1983 employment averaged 32,100 workers, which was 1.6% above 1982 but still below the 1981 total of 33,000. In this segment of the hosiery industry, a peak average employment level of 34,500 was reported in 1977. The 1983 level was about 7% below this peak.

The Bureau of Labor Statistics and the Census Bureau each use a different methodology in computing employment data and their figures do not agree exactly.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in the Hosiery Industry, 1981-1983
(Annual Averages)

	Women's Hosiery, Except Socks (SIC 2251*)			Hosiery, nec (SIC 2252*)		
	1983	1982	1981	1983	1982	1981
All employees (thous.)	33.5	31.6	31.8	32.1	31.6	33.0
Production workers (thous.)	30.0	28.3	28.5	28.9	28.6	30.0
Av. weekly earnings	$220.4	$191.57	$181.91	$207.04	$184.93	$181.98
Av. weekly hours	40.0	36.7	37.2	38.2	35.7	37.6

nec - not elsewhere classified
* See page 3 for definition of the Standard Industrial Classification (SIC) codes.

Source: U.S. Bureau of Labor Statistics

Number of Employees in the Hosiery Industry, 1980-1983
(Annual Averages)

Year	Total	Women's Hosiery	Hosiery, nec
1983	65,600	33,500	32,100
1982	63,200	31,600	31,600
1981	64,800	31,800	33,000
1980	63,800	31,000	32,800

nec - not elsewhere classified

Source: U.S. Bureau of Labor Statistics

LOCATION OF THE INDUSTRY

About nine out of 10 mills operating in the hosiery industry are located in the South, and this region accounted for over 93% of total hosiery production in 1983.

North Carolina is the dominant State in the industry. According to the National Association of Hosiery Manufacturers, North Carolina accounts for well over half of total hosiery production, and is particularly important in the output of sheer hosiery for women, accounting for about 59% of total 1983 production in this classification.

LOCATION OF THE INDUSTRY

Percent of Hosiery Production by Geographical Areas & Leading States, 1980, 1983

	Total, All Types		Women's Pantyhose		Other Sheer Hosiery (Women's)		Socks & Anklets	
	1983	1980	1983	1980	1983	1980	1983	1980
Total production	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
North, total	6.7	6.5	7.1	6.9	7.5	6.4	6.4	6.3
Pennsylvania	6.7	6.5	7.1	6.9	7.5	6.4	6.4	6.3
New England states, N.Y., N.J., Dela.	0.1	0.2	0.1	0.1	0.1	0.1	0.4	0.2
Midwestern & Western states	4.6	3.8	6.9	6.3	7.3	5.7	1.5	1.6
South	93.3	93.5	92.9	93.1	92.5	93.9	93.6	93.7
North Carolina	54.8	58.5	49.4	47.1	58.8	59.4	57.5	66.0
Tennessee	14.5	15.3	15.0	15.3	12.9	16.3	15.3	14.2
Georgia	4.5	3.1	0.3	0.5	0.8	1.0	10.2	6.3
Other Southern states*	19.5	16.6	28.2	30.2	20.0	17.2	10.6	7.2

*Includes Ala., Ark., Fla., Ky., Md., Miss., S.C., Tex., Va., West Va., and Puerto Rico.

Source: National Association of Hosiery Manufacturers, Inc.

OPERATING RATIOS

A series of annual line of business reports has been compiled by the Federal Trade Commission--the latest, covering the year 1976, was issued in May 1982.

The hosiery industry in the U.S. lagged far behind other manufacturing industries in operating income to sales ratio. It ranked 195th on that score with a ratio of 4.9%. The weighted average percent of operating income to sales for all manufacturing companies was 7.7%.

A revealing measure of industry performance is the ratio of promotion expenses to sales. This measurement includes all types of selling expense, including media advertising expenses, which are also separately reported in terms of percent to sales by the FTC. The hosiery industry ranks among the top 10 manufacturing industries in these ratios--ranking 5th in its ratio of selling expense to sales, 6th in its ratio of media advertising expense to sales.

Selected Operating Ratios For The Hosiery Industry Compared With All-Manufacturing Industry Averages, 1976

	Weighted Average All Mfg. Industries	Hosiery Industry
Operating income, % to assets	12.3	9.7
Operating income, % to sales	7.7	4.9
Total selling expense to sales, %	6.6	25.6
Media advtg. expense to sales, %	1.2	10.9
R & D expense, % to sales	1.9	0.1

Source: Bureau of Economics, Federal Trade Commission, Annual Line of Business Report, 1976 (May 1982)

NATIONAL ADVERTISING

An analysis of total spending for space and time in major media by the hosiery industry showed a total of over $65 million spent for advertising in the six major media.

Expenditures for Space/Time In Major Media By Hosiery Manufacturers, 1980

	Thous. of $
6-Media total	$ 65,131.1
Consumer magazines	13,196.8
Newspaper supplements	522.8
Network television	46,440.0
Spot television	4,170.8
Network radio	767.7
Outdoor	33.0

Source: Leading National Advertisers

In 1980, L'eggs topped the list of hosiery brands advertised in major media, with a total of $16.5 million, spent primarily for network television time. Hanes, producer of L'eggs hosiery spent an estimated $40 million for advertising and promotion in 1982. Their advertising budget for advertising alone in 1983 was reported to be in excess of $16 million.

Ad competitive pressure mounts to build a strong brand image, makers are increasingly stepping up promotions using designer names, names of athletic stars and other celebrity endorsements where pertinent. Meanwhile, many large retailers are establishing their own private label hosiery items, and many have been very successful in this area. In New York City, Bloomingdale's is reported to have 70% of its hosiery department in private label, Saks Fifth Avenue, New York, 50%. (WWD, Nov. 18, 1983)

PRODUCTION

The National Association of Hosiery Manufacturers, Inc., Charlotte, N.C., compiles hosiery industry information based on reports from manufacturers and estimates covering non-reporting hosiery producers.

Production of hosiery by U.S. mills reached a peak of 310.1 million dozen pairs in 1981, then as the recession got underway declined to 281.8 million dozen pairs in 1982. Production rebounded in 1983, reaching 309.4 million dozen pairs. Most segments of the industry shared in the gains last year, particularly products with a strong fashion statement such as casual hosiery and upscale pantyhose. Production of tights for women rose almost 49% compared with the 1982 total, according to the NAHM.

PRODUCTION

Production of Hosiery, 1980-1983
(Dozens of pairs in thousands)

	1983	1982	1981	1980	% Change 1983/82
Hosiery, total	309,420	281,768	310,060	280,237	+ 9.8%
Infants' & children's, sizes 3-8½	27,041	25,764	31,195	28,807	+ 5.0
Footsocks	620	618	794	720	+ 0.3
Anklets	16,522	16,055	20,494	19,620	+ 2.9
Mid-calf/crew	1,396	1,446	1,221	1,264	- 3.5
Knee-highs	6,993	6,653	7,686	6,620	+ 5.1
Waist-highs	1,471	992	1,000	943	+ 48.2
Stockings	39	*	0	0	--
Girls', boys', women's, sizes 8-11 (knit on less than 300 needles), total	54,223	46,324	58,780	48,764	+ 17.0
Footsocks	5,830	6,503	9,427	8,544	- 10.3
Cushion	5,424	6,121	8,657	7,444	- 11.4
Non-cushion	406	382	770	1,100	+ 6.3
Anklets	17,285	11,875	14,538	12,533	+ 45.6
Cushion	7,178	4,321	5,771	4,277	+ 66.1
Non-cushion	10,107	7,554	8,767	8,256	+ 33.8
Mid-calf/crew	4,858	3,984	4,509	3,046	+ 21.9
Cushion	3,732	2,982	3,398	2,402	+ 25.1
Non-cushion	1,126	1,002	1,111	644	+ 12.4
Knee-highs	25,654	23,403	29,823	24,325	+ 9.6
Cushion	9,966	6,958	9,966	7,974	+ 43.2
Non-cushion	15,688	16,445	19,857	16,351	- 4.6
Stockings	48	79	7	3	- 39.2
Waist-highs (tights) size 7 & up	548	480	476	313	+ 14.2
Women's & girls' hosiery (footsocks, pantyhose, stockings, tights, etc.) (knit on 300 needles or more) total	161,677	147,678	151,684	139,603	+ 9.5
Pantyhose	116,560	105,076	104,460	96,015	+ 10.9
Sheer	64,048	58,491	59,598	57,301	+ 9.5
Opaque	3,463	2,399	1,666	1,133	+ 44.3
Elastomer	47,622	43,226	42,505	36,704	+ 10.2
Other (tights, size 7 & up)	1,427	960	691	877	+ 48.6
Stockings	4,854	4,477	4,601	5,153	+ 8.4
Non-stretch	1,514	1,463	1,811	1,999	+ 3.5
Stretch	2,712	2,434	2,060	2,375	+ 11.4
Support	570	540	633	678	+ 5.5
Other	58	40	97	101	+ 45.0
Other women's hosiery	40,263	38,125	42,623	38,435	+ 5.6
Footsocks	369	372	433	224	+ 0.8
Anklets	791	756	1,126	1,147	+ 4.6
Knee-highs	39,067	39,979	41,064	37,064	+ 5.6
Mid-calf/crew	36	--	--	--	+100.0

(continued)

PRODUCTION

Production of Hosiery, 1980-1983
(Dozens of pairs in thousands)
(continued)

	1983	1982	1981	1980	% Change 1983/82
Men's hosiery (size 10 & up) (knit on less than 300 needles), total	66,479	62,002	68,401	63,063	+ 7.2%
Cushion	33,359	31,562	36,216	30,786	+ 5.7
Non-cushion	33,120	30,440	32,185	32,277	+ 8.8
Footsocks	471	352	517	292	+ 33.8
Cushion	262	144	179	164	+ 81.9
Non-cushion	209	208	338	128	+ 0.5
Anklets	26,721	26,723	27,285	27,624	--
Cushion	5,008	5,882	6,471	6,225	- 14.8
Non-cushion	21,713	20,841	20,814	21,399	+ 4.2
Mid-calf/crew	17,746	17,274	19,945	17,375	+ 2.7
Cushion	10,232	11,132	12,741	10,218	- 8.1
Non-cushion	7,514	6,142	7,204	7,157	+ 22.3
Knee-highs	21,541	17,653	20,654	17,772	+ 22.0
Cushion	17,857	14,404	16,825	14,179	+ 24.0
Non-cushion	3,684	3,249	3,829	3,593	+ 13.4

Source: National Association of Hosiery Manufacturers, Hosiery Statistics.

Control-top pantyhose for women accounted for 18.5% of 1983 total pantyhose production, 19.1% in 1982. Production was up 7.7% to reach 21,580 thousand dozen pairs in 1983.

CONSUMPTION OF FIBERS

Man-made fibers represent the bulk of all fibers consumed in the production of hosiery, although cotton makes up a significant portion of fibers used in specialized hosiery types.

Within the man-made fiber group, acrylic fibers are the major component except in women's and girls' hosiery/pantyhose, etc., knit on 300 needles or more. Practically all of these are made of nylon.

CONSUMPTION OF FIBERS

Fiber Content of Hosiery Produced in the Jan.-April 1983 Period

		Infants'/ Children's	Girls'/Boys'/Women (Sizes 8-11)		Women's/ Girls' Hosiery	Men's Hosiery (Sizes 10 & Up)	
	Total	(Sizes 3-8½)	Cushion	Non-cushion	(300 Needles+)	Cushion	Non-cushion
Total production	100%	100%	100%	100%	100%	100%	100%
Natural fibers	11	25	43	20	*	29	14
Cotton	11	25	43	19	*	28	8
Wool	*	nr	*	1	nr	1	6
Man-made fibers	89	75	57	80	100	71	86
Acrylic	22	41	54	48	*	70	69
Nylon	66	34	2	32	100	1	16
Polyester	*	*	1	*	*	nr	nr
Other	*	*	*	nr	*	*	*

nr - not reported
* Less than 1%.

Source: National Association of Hosiery Manufacturers, Inc.
Hosiery Statistics

Information on fiber consumption by end-product is also compiled by the Textile Economics Bureau. According to this source, total fiber consumption in sheer hosiery in 1982 was off 1.9% in 1982 compared with 1981, reaching 71.6 million pounds; in anklets and socks, consumption dropped 9.2%, to reach 173.2 million pounds.

It is reported that natural fibers are taking on increased importance in the hosiery market as manufacturers introduce more fashion into their lines. All-cotton, all-wool and predominantly natural fiber blends account for about 32% of men's hosiery purchases, according to 1982 Market Research Corp. of America (MRCA) data.

Orlon acrylics, Orlon acrylic blends and other acrylics are reported to represent about 49% of men's hosiery. Designer hosiery collections have been a big factor in pushing the industry toward more natural fibers, as well as toward more colors.

High-bulk Orlon dominates in athletic socks, but some trend toward greater use of cotton and wool has been reported. Consumers have become increasingly informed and selective in making purchases of athletic socks. Makers are greatly expanding use of informative hangtags on fiber content as well as on construction and information to build a strong brand image.

CONSUMPTION OF FIBERS

Textile Fibers Consumed in U.S. Production of Hosiery, 1980-1982
(millions of pounds)

	1982	1981	1980	% Change 1982/1981
Sheer hosiery, total reported*	71.6	73.0	70.7	- 1.9%
Man-made, total	68.5	69.9	67.8	- 2.0
Anklets & socks, total**	173.2	190.8	186.4	- 9.2
Man-made, total	139.9	149.1	151.9	- 6.2
Cotton	30.8	38.9	32.1	- 20.8
Wool	2.5	2.8	2.4	- 10.7

* Includes women's full-fashioned and seamless full-length hosiery, pantyhose, knee-highs and surgical hosiery.

** Includes men's & women's foot socks, anklets and nonsheer knee-high hose. Also includes men's mid-calf and surgical hose.

Source: Textile Economics Bureau,
Textile Organon, October 1983

SHIPMENTS

In interim years between the complete censuses of manufactures which are compiled every five years, the U.S. Bureau of the Census issues estimates on the value of shipments by major product types based on a sample survey of manufacturers. The next detailed census report will cover the year 1982 and preliminary data will be released on the hosiery industry in 1984.

According to the 1981 annual survey of manufactures, the value of hosiery shipped by U.S. mills reached $2.4 billion. This represented a gain of 6% in current dollars compared with the 1980 total. The sharpest gain (about 21%) was chalked up in shipments in the anklets/socks-for-women/boys/girls classification.

Summary of Value of Shipments of Hosiery by All Producers, 1978-1981
(millions of dollars)

	1981	1980	1979	1978	% Change 1981/1980
Hosiery, total	$2,432.5	$2,295.4	$2,090.3	$1,888.0	+ 6.0%
Women's except socks (SIC 2251*)	1,132.5	1,105.9	1,044.9	889.8	+ 2.4
Finished seamless hosiery, pantyhose	1,017.7	982.2	930.1	774.4	+ 3.6
Seamless full-length, knee-length & pantyhose shipped in greige	79.9	82.2	79.2	68.1	- 2.8
Full-fashioned hosiery, finished	8.5	nr	nr	nr	--
Full-fashioned hosiery, shipped in greige	1.8	1.6	nr	nr	+ 12.5
Hosiery exc. socks, type not specified	24.6	33.3	20.5	nr	- 26.1

(continued)

SHIPMENTS

Summary of Value of Shipments of Hosiery by All Producers, 1978-1981
(millions of dollars)
(continued)

	1981	1980	1979	1978	% Change 1981/1980
Hosiery, nec (SIC 2252*)	$1,300.0	$1,189.5	$1,045.4	$ 998.2	+ 9.3%
Men's finished seamless hosiery	705.9	681.9	627.6	525.9	+ 3.5
Other finished seamless hosiery (anklets, knee socks for women, boys, girls; children's hosiery, etc.)	429.5	355.2	318.3	299.2	+ 20.9
Seamless shipped in greige, nec	118.3	113.7	70.2	114.4	+ 4.0
Hosiery, nec, nsk	46.3	38.7	29.4	--	+ 19.6

nec - not elsewhere classified
nsk - not specified by kind
nr - not reported
* For definitions of SIC codes, see page 3

Source: U.S. Bureau of the Census,
Annual Surveys of Manufactures

Distribution

Limited information on the distribution of manufacturers' shipments of hosiery, based on a class of customer survey, was included in reports from the most recently issued Census of Manufactures. Of the reported total of women's hosiery shipments, 46% was shipped direct to retailers; of the total in other types of hosiery, 51% went direct to retailers in 1977.

Reported Distribution of Hosiery Shipments by Class of Customer, 1977

	Women's Hosiery, Except Socks (SIC 2251*)		Hosiery, nec (SIC 2252*)	
Total value of shipments (mil. $)	$ 819.1	%	$ 893.6	%
As reported in class of customer survey (mil. $)	595.4	100	701.2	100
Shipments to customers				
To wholesalers	59.3	10	132.4	19
Shipments--				
To retailers	272.8	46	361.0	51
To manufacturers	27.8	5	98.0	14
Other, including other establishments of same company	235.5	39	109.8	16

* For definitions of SIC codes, see page 3

Source: U.S. Bureau of the Census, 1977 Census of Manufactures,
Distribution of Sales by Class of Customer (MC77-SR-13).

SHIPMENTS

Industry Concentration

The hosiery industry--particularly the women's segment--is highly concentrated among large producers, according to findings in the 1977 census of manufactures. In that year, the top four companies controlled over half the value of U.S. shipments of women's hosiery. In men's seamless hosiery, the top 20 producers held a 59% share of the total shipments.

Share of Total Hosiery Shipments by All Producers Accounted For by The 4, 8, 20 & 50 Largest Companies, 1972, 1977

Specified types:		Total Value (mil.$)	% Accounted For by the Largest Companies Top 4	Top 8	Top 20	Top 50
Women's hosiery, except socks (SIC 2251)	1977	$819.1	50%	61%	77%	92%
	1972	899.5	34	47	67	85
Men's finished seamless hosiery (SIC 22522)	1977	464.6	24	36	59	82
	1972	285.9	27	40	61	85
All other finished seamless hosiery (SIC 22523)	1977	274.3	26	36	57	84
	1972	188.7	27	39	61	84
Seamless hosiery, exc. women's, shipped in the greige	1977	93.5	42	55	77	99
(SIC 22524)	1972	78.6	42	54	72	93

Source: U.S. Bureau of the Census, Census of Manufactures (MC77-SR-13).

The largest mills are in the women's hosiery component of the industry (SIC 2251) In 1981 mills with 250 or more employees represented only 21.4% of all the mills in the women's hosiery segment, but accounted for over 74% of total employment. Mills making men's and other types of hosiery (SIC 2252) are more numerous, but tend to have fewer employees.

Hosiery Manufacturers by Employment Size, 1981

	Women's Hosiery (SIC 2251*)			Hosiery nec (SIC 2252*)		
	No. of Mills	% of Mills	% of Employment	No. of Mills	% of Mills	% of Employment
Total establishments	160	100.0%	100.0%	362	100.0%	100.0%
Number by employment size:						
Under 10 employees	23	14.4	0.3	59	16.3	na
10 to 19 employees	20	12.5	0.9	52	14.4	2.5
20 to 49 employees	33	20.6	3.6	97	26.8	9.8
50 to 99 employees	24	15.0	5.8	55	15.2	12.5
100 to 249 employees	24	15.0	13.5	62	17.1	31.0
250 to 499 employees	17	10.6	18.7	33	9.1	34.5
500 employees or more	19	11.9	57.2	4	1.1	na

na - not available nec - not elsewhere classified.

*For definitions of SIC codes, see page 3.

Source: U.S. Bureau of the Census, County Business Patterns 1981.

SHIPMENTS

Industry Concentration

At hosiery market time in March 1984 many hosiery manufacturers were anticipating a "shakedown", continuing the trend in the industry to a weeding out of the weaker hosiery firms. As in other areas of the U.S. apparel industry, firms have consolidated operations or merged to an increasing extent in the hosiery industry. In 1982 the domestic hosiery and sock division of Burlington Industries, which had a volume estimated at $132 million, was acquired by Kayser-Roth Corp., a division of Gulf & Western Industries.

Sales Concentration

Number of Companies in the Hosiery Industry & Their Sales
By Employment & Sales Size, 1977

	Companies		Industry Sales	
	Number	Percent	Mil. $	Percent
Total	528	100.0%	$1,609.9	100.0%
Paid employees:				
Under 50	350	66.3	148.7	9.2
50 - 249	135	25.6	382.7	23.8
250 & over	43	8.1	1,078.5	67.0
Sales size:				
Under $500,000	232	43.9	na	--
$500,000 - $999,999	98	18.6	70.2	4.4
$1 mil. - $4.9 mil.	144	27.3	333.3	20.7
$5 mil. - $9.9 mil.	30	5.7	217.2	13.5
$10 mil. - $24.9 mil.	15	2.8	237.5	14.7
$25 mil. & over	9	1.7	na	--

Sales Concentration Summaries

	Mills		Industry Sales	
	Number	Percent	Mil. $	Percent
Hosiery Industry, 1977				
Total	540	100.0%	$1,609.9	100.0%
4 largest companies	48	7.5	543.3	33.7
8 largest companies	65	10.1	664.3	41.3
20 largest companies	98	15.3	883.3	54.9
50 largest companies	150	23.4	1,131.7	70.3
Other companies	492	76.6	478.3	29.7

SHIPMENTS

Sales Concentration

	Total Value (Mil. $)	Share of Value of Industry Shipments 1972, 1977 % of Total By Largest Companies: 4 Largest	8 Largest	20 Largest	50 Largest
Women's hosiery, exc. socks (SIC 2251*)					
1977 (176 companies)	$ 871.2	50%	62%	78%	94%
1972 (256 companies)	984.7	35	49	69	87
Hosiery, nec (SIC 2252*)					
1977 (382 companies)	921.3	20	30	46	66
1972 (375 companies)	600.6	19	29	46	66

nec - not elsewhere classified
* For definitions of SIC codes, see page 3.

Source: U.S. Bureau of the Census, 1977 Census of Manufactures, Concentration Ratios in Manufacturing; 1977 Enterprise Statistics, General Report on Industrial Organization.

Detailed information on shipments of hosiery, in terms of pairs, is compiled by the National Association of Hosiery Manufacturers, Charlotte, N.C. Information is based on reports submitted to the association by knitting mills producing a majority of all types of hosiery made in the U.S., and these reports reflect overall industry trends. Data are adjusted by the association to include in totals estimates for nonreporting mills.

U.S. mill shipments of hosiery of all types in 1983 reached a record total of 308,079 thousand dozen pairs, gaining 9.8% over the 1982 total. Shipments in 1982 had fallen 4.8% below the 1981 level, reflecting the recession that prevailed in the U.S. and abroad.

Infants' & Children's Hosiery

In the smaller size categories, shipments in 1983 declined 1.4% compared with the previous year, reaching 24,483 thousand dozen pairs. This was 5,290 thousand dozens below the peak reached in 1979. Anklets are the largest category in infants'/children's hosiery, accounting for 61.3% of the 1983 total, down from the peak year 1979, when they accounted for 68.3% and over 22 million dozen pairs were shipped.

Girls', Boys', Women's Socks, etc.

Shipments of anklets, both cushion and non-cushion, were the fastest growing hosiery category. The total gained over 35% in 1983 compared with 1982, reaching 16,609 thousand dozen pairs. Within the size range 8 to 11, covering hosiery knit on less than 300 needles, knee-highs represented 47.2%, down from 49.5% in 1982.

SHIPMENTS

Women's Hosiery

Shipments of all types of women's and girls' hosiery knit on 300 needles or more in terms of pairs gained 7.1% in 1983 compared with 1982. Pantyhose shipments were up 8.8% and represented 71.8% of the total in this classification, up from a 70.7% share of the total in 1982 and 68.3% in 1981.

Shipments of sheer, conventional pantyhose were up 8.2% and accounted for 55.8% of the 1983 pantyhose total. In 1982 they represented 56%. Shipments of opaque pantyhose registered a sharp gain of 81% in 1983 compared with 1982, and they increased their share of the pantyhose total from 1.7% to 2.8%.

The elastomer pantyhose category continues to gain ground. Shipments were 5.8% in 1983 and they represented 40.3% of all pantyhose and 29% of all women's hosiery. This compares with a 26.8% share of the total in 1981.

Stockings continued the steady decline noted for the past 10 years. In this span shipments of women's hosiery have declined 67%, dropping from over 14 million pairs in 1974 to 4.6 million in 1983. Total women's hosiery shipments in the 10-year period, on the other hand, gained 78%; pantyhose, alone, went up over tenfold.

Men's Hosiery

Shipments of men's hosiery increased, but at a lower rate than noted for other categories. Anklets are the dominant type, but shipments were off 1.7% due to a drop in cushion types. Anklets accounted for 40.3% of the men's hosiery total in 1983, down from 43.6% in 1982. Knee-highs made a sharp gain in 1983 (up 19%) and increased in share of men's hosiery shipments from 28.1% in 1982 to 31.5% in 1983.

After dropping in popularity in 1982, shipments of mid/calf/crew socks for men recovered in 1983--with the gain concentrated in cushion types.

In the 10-year period 1974 to 1983, shipments of all types of men's hosiery in terms of pairs rose only 4.6%. A peak of over 74 million pairs was reached in 1978. The 1983 total was 10% below the record high, due to sharp declines in the demand for anklets. Shipments of this type in 1974 amounted to 53.8 million dozen pairs, falling to 26.9 million dozen pairs by 1983.

All Hosiery

Hosiery Shipments, 1980-1983
(Dozens of pairs in thousands)

	1983	1982	1981	1980	% Change 1983/1982
Hosiery total	308,079	288,704	304,826	286,379	+ 6.7%
Infants' & children's, sizes 3-8½	24,482	24,825	29,578	27,563	- 1.4
Footsocks	546	691	757	630	- 21.0
Anklets	15,002	15,207	19,807	18,206	- 1.3
Mid-calf/crew	1,474	1,559	1,085	1,211	- 5.5
Knee-highs	6,218	6,459	7,067	6,769	- 3.7
Waist-highs	1,207	908	862	747	+ 32.9
Stockings	35	1	*	*	--

(continued)

Hosiery Shipments, 1980-1983

(Dozens of pairs in thousands)
(continued)

	1983	1982	1981	1980	% Change 1983/1982
Girls', boys', women's, sizes 8-11 (knit on less than 300 needles), total**	52,794	47,980	58,078	48,981	+ 10.0%
Footsocks	5,789	6,814	9,246	7,879	- 15.0
Cushion	5,361	6,398	8,477	6,741	- 16.2
Non-cushion	428	416	1,907	1,138	+ 2.9
Anklets	16,609	12,283	15,414	13,564	+ 35.2
Cushion	6,336	4,830	6,086	4,614	+ 31.2
Non-cushion	10,273	7,453	9,328	8,950	+ 37.8
Mid-calf/crew	4,906	4,548	4,166	3,206	+ 7.9
Cushion	3,736	3,493	3,083	2,448	+ 2.0
Non-cushion	1,170	1,055	1,083	758	+ 10.9
Knee-highs	24,906	23,776	28,804	24,024	+ 4.8
Cushion	9,008	7,082	9,915	7,630	+ 27.2
Non-cushion	15,899	16,694	18,889	16,394	- 4.8
Stockings (women's)	46	67	9	8	- 31.3
Waist-highs (women's)	537	492	439	300	+ 9.1
Women's & girls' hosiery (footsocks, pantyhose, stockings, tights, etc.) (knit on 300 needles or more)	164,106	153,176	147,291	144,164	+ 7.1
Pantyhose	117,788	108,242	100,617	99,442	+ 8.8
Sheer	65,694	60,721	59,332	60,153	+ 8.2
Opaque	3,320	1,833	1,209	1,017	+ 81.1
Elastomer	47,480	44,858	39,444	37,402	+ 5.8
Other	1,294	830	632	870	+ 55.9
Stockings	4,599	4,638	4,731	5,479	- 0.8
Non-stretch	1,460	1,752	1,851	2,200	- 16.7
Stretch	2,576	2,374	2,202	2,507	+ 8.5
Support	490	460	621	658	+ 6.5
Other	73	52	57	114	+ 40.4
Other women's hosiery	41,719	40,296	41,943	39,243	+ 3.5
Footsocks	473	492	508	253	- 3.9
Anklets	865	870	968	1,144	- 0.6
Knee-highs	40,348	38,916	40,467	37,846	+ 3.7
Mid-calf/crew	33	18	*	*	+ 83.3

(continued)

SHIPMENTS

Hosiery Shipments, 1980-1983
(Dozens of pairs in thousands)
(continued)

	1983	1982	1981	1980	% Change 1983/1982
Men's hosiery (size 10 & up) (knit on less than 300 needles), total	66,697	62,723	69,879	65,671	+ 6.3%
Cushion	32,669	31,516	36,269	31,850	+ 3.7
Non-cushion	34,028	31,207	33,610	33,821	+ 9.0
Footsocks	327	291	402	233	+ 12.4
Cushion	160	133	132	122	+ 20.3
Non-cushion	167	158	270	111	+ 5.7
Anklets	26,899	27,376	30,108	29,863	- 1.7
Cushion	5,340	6,449	7,795	7,548	- 17.2
Non-cushion	21,559	20,927	22,313	22,315	+ 3.0
Mid-calf/crew	18,488	17,445	18,472	16,887	+ 6.0
Cushion	9,875	10,899	11,652	9,413	- 9.4
Non-cushion	8,613	6,566	6,820	7,474	+ 31.2
Knee-highs	20,983	17,611	20,897	18,688	+ 19.1
Cushion	17,294	14,035	16,690	14,767	+ 23.2
Non-cushion	3,689	3,576	4,207	3,921	+ 3.2

* Less than 0.1%.

**According to a special NAHM survey, girls' and women's hosiery represents about 72% of the total on hosiery size 8-11, knit on less than 300 needles; boys', 28%.

Source: National Association of Hosiery Manufacturers, *Hosiery Statistics*.

SHIPMENTS

The combined total of hosiery knit on 300 needles or more and under 300 needles (size 8-11), based on NAHM data, shows total shipments of specific types of women's and girls' hosiery, and boys' hosiery as follows in 1982 and 1983.

Estimated Shipments of Specified Types of Hosiery, 1982, 1983
(dozens of pairs in thousands)

	1983	1982	% Change 1983/1982
Women's & girls'			
Knee-highs, total	58,530	55,797	+ 4.9%
300 needles or more	40,248	38,916	+ 3.4
Less than 300 needles	18,182	16,881	+ 7.7
Footsocks	6,030	7,306	- 17.5
300 needles or more	473	492	- 3.9
Less than 300 needles	5,557	6,814	- 18.4
Anklets	14,974	9,837	+ 52.2
300 needles or more	863	870	- 0.8
Less than 300 needles	14,111	8,967	+ 57.4
Mid-calf/crew	1,161	427	+171.9
300 needles or more	33	18	+ 83.3
Less than 300 needles	1,128	409	+175.8
Boys', (less than 300 needles)			
Knee-highs	6,725	6,895	- 2.5
Mid-calf/crew	3,778	4,139	- 8.7
Anklets	2,498	3,316	- 24.7
Footsocks	232	--	--

Source: Estimates based on NAHM data.

Athletic Hosiery & Bodywear

Emphasis on fitness and in active sports has made athletic hosiery and bodywear two of the fastest growing segments of hosiery. Most hosiery firms have added these to their product lines and have been devising strong promotions on their upgraded, branded lines and broadening their retail distribution patterns.

Sales volumes in 1982 of the leading manufacturers in these specialized areas of hosiery have been reported as follows:

Estimated Sales of Athletic Socks by Leading Manufacturers, 1982

	Millions of $
Neuville-Mobil Six Inc.*	$ 35.0
Adams-Millis**	35.0
Russell National	34.0
Interwoven	21.0
Burlington	20.0
Wigwam Mills	18.5
Twin City Knitting Co.	15.0

(continued)

Estimated Sales of Athletic Socks by Leading Manufacturers, 1982
(continued)

	Millions of $
Ballston Knitting Co. Inc.	$ 13.0
Ridgeview Mills	10.5
Rockford Textiles	10.0
Thor-10	7.0
SAI/Kemfast	5.5
Hanes-Millis	5.0
Softouch	3.5

* Includes Spalding and private label.
**Includes ABC Sports, Sportime and private label.

Source: SportStyle, May 23, 1983.

Estimated Sales of Bodywear/Exercise Apparel By Leading Manufacturers, 1982

	Millions of $
Danskin	$ 100.0
Flexatard	22.0
Carushka	13.0
West Grove	9.0
Stevi Brooks	7.8
Alba Waldensian	7.5
Kellwood	7.5
Scotch Maid	6.5

Source: SportStyle, May 23, 1983

Seasonal Pattern In Hosiery Shipments Percent of Unit Shipments By Months, 1983

	Infants'/ Children's	Girls'/Boys'/Women's (Sizes 8-11)	Women's/Girls' (300 Needles +)	Men's (Sizes 10-13)
Total	100.0%	100.0%	100.0%	100.0%
January	7.2	7.2	7.4	8.0
February	7.9	7.2	7.5	7.9
March	9.0	8.9	8.2	7.6
April	7.5	8.9	9.0	7.7
May	8.6	9.0	8.3	8.8
June	11.5	8.9	7.8	8.7
July	8.9	9.1	10.8	7.8

(continued)

SHIPMENTS

Seasonal Pattern In Hosiery Shipments
Percent of Unit Shipments By Months, 1983
(continued)

	Infants'/ Children's	Girls'/Boys'/Women's (Sizes 8-11)	Women's/Girls' (300 Needles +)	Men's (Sizes 10-13)
August	7.5%	8.3%	8.0%	8.1%
September	7.9	8.8	8.1	8.1
October	8.8	8.3	8.6	7.7
November	8.3	8.2	7.3	10.5
December	6.9	7.2	8.1	9.1

Source: Based on data compiled by National Association of Hosiery Manufacturers, Inc.

FOREIGN TRADE

The U.S. hosiery industry generally enjoys a favorable balance of trade but the margin is narrowing. In 1979, a total of about 5.9 million dozen pairs of hosiery of all types were exported, and in the following year the total climbed to 7.5 million pairs. In 1983, however, total exports declined to 4.7 million dozen pairs. This was 16% below the 1982 total.

Imports, on the other hand, amounted to 3.7 million dozen pairs, up 61% over the 1982 total, but 6.4% below the total imported in 1979. The decline compared to 1979 was due entirely to a drop in imports of pantyhose, which amounted to only 1.6 million dozen pairs in 1983 compared with 3.9 million dozen pairs in 1979. The 1983 total was, however, 40% above pantyhose imports in 1982.

Half of the pantyhose exports reported in 1983 were to Costa Rica under regulation 807 which covers unfinished goods sent abroad for processing and then shipped back to the U.S. Canada is the leading customer for U.S. hosiery in terms of quantity and value. Israel and Taiwan rank among the leading sources of U.S. imports.

Hosiery Imports & Exports, 1979-1983

Imports	Thousand Dozen Pairs				
	1983	1982	1981	1980	1979
Total imports	3,697	2,294	2,193	3,127	3,948
Pantyhose	1,609	1,146	1,265	2,575	3,275
Other hosiery:					
Cotton	243	85	63	31	22
Wool	137	91	101	92	94
Man-made fiber	1,708	972	764	429	557

(continued)

FOREIGN TRADE

Imports

Hosiery Imports & Exports, 1979-1983
(continued)

	Customs Value (thousands of dollars)*				
	1983	1982	1981	1980	1979
Total value	$23,004	$14,558	$13,913	$15,442	$15,579
Pantyhose	9,520	6,163	6,105	10,244	10,781
Other hosiery:					
Cotton	2,869	1,090	1,136	455	297
Wool	2,869	2,298	2,533	2,283	2,020
Man-made fiber	7,746	5,007	4,139	2,440	2,481

Exports

	Thousand Dozen Pairs				
	1983	1982	1981	1980	1979
Total exports	4,728	5,646	7,125	7,530	5,894
Pantyhose	966	1,159	1,091	1,314	1,507
Women's full- and knee-length hosiery	840	1,126	1,586	1,741	1,090
Other hosiery	2,922	3,361	4,448	4,475	3,297

	Value (thousands of dollars)				
	1983	1982	1981	1980	1979
Total value	$42,509	$48,441	$56,864	$54,303	$37,227
Pantyhose	8,477	9,884	7,224	7,628	8,947
Women's full- and knee-length hosiery	9,214	9,685	11,566	13,397	7,226
Other hosiery	24,818	28,872	38,074	33,278	21,054

* As valued for customs purposes. Does not include duties, freight or insurance.

Source: National Association of Hosiery Manufacturers based on U.S. Bureau of the Census reports.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Projections of the U.S. Population, 1983-2000

	Number (Thous.)			% Change	Percent Distribution		
	1983	1990*	2000*	2000/1983	1983	1990	2000
FEMALE							
Total, all ages	120,216	128,234	137,611	+ 14.5%	100.0%	100.0%	100.0%
Under 5 years	8,713	9,369	8,601	- 1.3	7.2	7.3	6.3
5 to 9 years	7,793	9,080	9,157	+ 17.5	6.5	7.1	6.6
10 to 15 years	10,417	9,791	11,419	+ 9.6	8.7	7.6	8.3
16 years & over	93,293	99,994	108,436	+ 16.2	77.6	78.0	78.8
16-19	7,654	6,704	7,373	- 3.7	6.4	5.2	5.4
20-34	30,925	30,774	26,442	- 14.5	25.7	24.0	19.2
35-54	26,458	32,170	40,810	+ 54.2	22.0	25.1	29.6
55 & over	28,256	30,346	33,811	+ 19.7	23.5	23.7	24.6
Median age (years)	32.2	34.3	37.7	+ 17.1			
MALE							
Total, all ages	113,977	121,498	130,379	+ 14.4	100.0	100.0	100.0
Under 5 years	9,133	9,831	9,024	- 1.2	8.0	8.1	6.9
5 to 9 years	8,155	9,519	9,601	+ 17.7	7.1	7.8	7.4
10 to 15 years	10,982	10,240	11,968	+ 9.9	9.6	8.4	9.2
16 years & over	85,797	91,907	99,787	+ 16.3	75.3	75.6	76.5
16-19	7,958	6,999	7,709	- 3.1	7.0	5.8	5.9
20-34	31,162	31,301	27,071	- 13.1	27.3	25.8	20.8
35-54	25,302	31,066	40,002	+ 58.1	22.2	25.5	30.7
55 & over	21,376	22,541	25,005	+ 17.0	18.8	18.5	19.1
Median age (years)	29.6	31.8	34.9	+ 17.9			

* Middle series projections (out of three) which assumes a fertility rate of 2.1, or at the replacement level.

Note: Columns may not add to totals shown due to rounding

Source: U.S. Bureau of the Census, Series P25, No. 922
(October 1982)

Women constitute the largest market for hosiery, consuming an average of 26 pairs (including socks, etc.) per capita in 1983 compared with an overall per capita consumption of hosiery amounting to about 16 pairs. According to reports on consumer purchases of hosiery in 1983 compiled by NPD Special Industry Services (Textile and Apparel Market Index) purchases by type were divided as follows: pairs--men's, 24.8%, boys', 15.1%, women's, 50.9%, girls', 9.3%; expenditures--men's, 25.3%, boys', 11.6%, women's, 55.3%, girls', 7.8%.

THE POTENTIAL MARKET

The market potential for women's hosiery has expanded not only due to the growth in population but also to the rapid increase in the number of women in the labor force. This group requires more apparel than nonworking women and are the most open to new fashion approaches in color and texture. The expansion in the number of working women has slowed down, but as of December 1983 there was a total of 48,926,000 in the civilian labor force, of which 45,244,000 women were employed. This compares with an average of 31,257,000 women employed in 1972.

A much greater percentage of women are now in managerial or professional occupations which require more emphasis on dress. In 1982 this group represented 21.7% of all employed women compared with 17.0% in 1972.

Market potential for men's socks continues to be enhanced by the growing interest in variety, color and fashion interest in men's wardrobes. The greater emphasis on activewear and participation in fitness activities has spurred the market for athletic hosiery and many new merchandising techniques have been adopted by a greater variety of retailers who are catering to this market.

Per Capita Consumption of Hosiery Based on Supply*

Year	Total Pairs	Infants'/ Children's**	Boys', Girls', Women's Sizes 8-11***	Women's#	Men's##
1983	15.9	8.8	16.4	21.0	9.1
1982	14.9	9.0	14.7	19.7	8.5
1981	15.9	10.7	17.6	19.2	9.6
1980	15.2	10.2	15.1	19.3	9.1
1979	15.7	10.9	15.4	18.8	10.5
1975	12.8	7.9	12.7	14.6	9.7

* Shipments by U.S. mills plus imports, less exports.
**Includes boys and girls through 9 years of age.
***Includes males and females 10 to 14, and females 15 to 24 years of age.
# Includes females age 15 and over.
\##Includes males age 15 and over.

Source: National Association of Hosiery Manufacturers.

RETAIL SALES

The total market for hosiery of all types at retail is estimated at about $6.0 billion, with women's hosiery accounting for some 55% of the total; men's 25%; boys', 12%; girls', 8% in 1983.

Official figures on sales share by type of outlet will not be available until reports on the 1982 census of retail trade are issued by the U.S. Bureau of the Census, updating 1977 census findings. A trade publication, Supermarket Business, estimated sales of women's hosiery in 1982 at $3.2 billion of which grocery stores accounted for 19%. Figures on reported purchases by outlet type from a representative panel of consumers, compiled in the Textile and Apparel Market Index, NPD Special Industry Services, are covered in the section on BUYING HABITS.

RETAIL SALES

Value of Domestic Consumption of Hosiery, 1981, 1982 & Estimated Share Held By Grocery Stores

	Thous. of $		% of Total Accounted For By Grocery Stores	
	1982	1981	1982	1981
Women's hosiery, total	$3,231,590	$3,101,110	19%	19%
Pantyhose	3,058,770	2,921,460	19	20
Stockings	172,820	179,650	6	6
Men's hosiery	1,139,700	1,031,400	4	4

Source: Supermarket Business, September 1983

Women's & Girls' Hosiery

Department stores and specialty stores account for the major share of women's upscale, fashion hosiery and bodywear; discounters and mass merchandisers are the major outlets for other types of women's hosiery.

Average Retail Price of Pantyhose By Type of Retailer, 1979-1982

	1982*	1981	1980	1979
Department/specialty stores	$ 2.20	$ 2.10	$ 2.00	$ 1.83
General mdse. chains (Sears, Penney, Ward)	1.93	1.90	1.87	1.54
Discount/variety stores	1.53	1.38	1.22	1.07
Grocery stores/supermarkets	1.71	1.53	1.49	1.38
Drug stores	1.69	1.56	1.47	1.35

* Forecast

Source: STORES (June 1981) (Based on MRCA, L'eggs Sales Research)

Women's Pantyhose & Knee-highs Sales Share Trends By Type of Retailer, 1978-1982

	1982*	1981	1980	1979	1978
Total Sales	100.0%	100.0%	100.0%	100.0%	100.0%
Department/specialty stores	17.6	18.0	18.5	19.0	18.8
General mdse. chains (Sears, Penney, Ward)	10.9	11.2	11.5	11.8	12.5
Discount/variety stores	29.4	29.2	29.2	30.2	29.5
Grocery stores/supermarkets	25.7	24.6	24.2	22.6	22.0
Drug stores	11.5	11.2	10.9	9.7	9.2
Other outlets	4.9	5.8	5.7	6.7	8.0

* Forecast

Source: STORES, (June 1981) (Based on MRCA, L'eggs Sales Research)

RETAIL SALES

Women's & Girls' Hosiery

Market share by type of outlet varies by type of pantyhose, as noted below.

Women's Pantyhose & Knee-high Sales Share
By Type of Retailer, 1980

	Non-Support	Support	Knee-Highs	Control Top	Panty Top	Total Market
Total Sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department/specialty stores	19.2	16.5	11.0	26.0	23.2	18.5
General mdse. chains (Sears, Penney, Ward)	9.0	9.5	8.6	14.0	9.4	11.5
Discount/variety stores	25.2	14.3	39.7	20.0	26.3	29.2
Grocery stores/supermarkets	28.4	33.8	22.4	25.8	15.7	24.2
Drug stores	9.9	15.4	12.9	10.1	8.7	10.9
Other outlets	8.3	10.5	5.4	4.1	16.7	5.7

Source: STORES (June 1981) (Based on MRCA,
A.C. Nielsen)

A special analysis of women's nylon/spandex hosiery retail sales--estimated at $2 billion-plus in 1983--has been made in terms of hosiery type and retail outlet type. (*Women's Wear Daily*, April 20, 1984).

Distribution of Women's Nylon/Spandex Hosiery Sales, 1983

By Hosiery Type	
Regular sheer pantyhose	43%
Sheer Knee-highs	28
Support & control top pantyhose (elastomeric)	25
Nylon stockings	4
Total	100%

By Type of Retail Outlet	
Discount stores	20%
Supermarkets	20
Chains	20
Department stores	15
Drug stores	10
All other outlets	15
Total	100%

RETAIL MERCHANDISING & OPERATING RESULTS

Women's Hosiery Departments

Women's Hosiery & Sock Operating Performance, 1982
(Supermarkets With Total Volume of $2 Million or More)

	% of Total Soft Goods Dept. Sales	1982 Sales (Mil. $)	% Chgs. In Sales 1982/81	% of Soft Gds. Dept. Gross Profit	Gross Profit (Mil. $)	Av. Gross Margin (% of Retail)
Hosiery	54.37	$436.70	- 3.93	57.51	$175.53	40.2
Pantyhose	46.81	376.64	- 4.53	49.85	152.16	40.4
Stockings	7.48	60.06	- 0.01	7.66	23.36	38.9
Socks (all types)	8.45	67.83	+ 6.63	9.02	27.54	40.6

Source: *Chain Store Age/Supermarkets* (July 1983)

RETAIL MERCHANDISING & OPERATING RESULTS

Women's Hosiery Departments

Women's Hosiery Department Merchandising & Operating Results, 1982 Compared With Total Adult Female Intimate Apparel & Accessories Division

(Selected Median Results)

	Mdse. Division: Adult Female Intimate Apparel & Access.	Department: Women's Hosiery
WOMEN'S/FAMILY SPECIALTY STORES (With Total Sales Over $1 Million)	(31)*	(18)*
Cumulative markon %	52.3	50.7
Markdowns - % of net retail sales	13.3	7.5
Gross margin (incl. cash discounts) % of net sales	47.1	46.6
Stock turns (times) at retail	2.7	2.5
Net sales % change from 1981	+ 0.6	+ 15.3
Net sales % of mdse. div. (intimate apparel, access.)	100.0	2.1
$ sales per sq. ft. of selling space (main or largest selling unit)	158.3	289.0
DEPARTMENT STORES (With Total Sales Over $1 Million)	(99)*	(90)*
Cumulative markon %	51.5	49.0
Markdowns - % of net retail sales	9.3	5.2
Gross margin (incl. cash discounts) % of net sales	48.4	47.3
Stock turns (times) at retail	3.0	3.5
Net sales % change from 1981	+ 4.7	+ 12.6
Net sales % of mdse. div. (intimate apparel, access.)	100.0	13.3
$ sales per sq. ft. of selling space (main or largest selling unit)	153.7	219.1

* Number of firms reporting.

Source: National Retail Merchants Association: Department Store & Specialty Store Merchandising & Operating Results of 1982.

Men's Hosiery Departments

Typical Operating Results in Men's Hosiery in Men's Wear Stores, 1982

(Median Results)

	Total Reporting Firms		Firms Handling Men's Wear Only		Firms Handling Women's Wear	
Men's hosiery						
% to total furnishings sales	6.1	(87)	6.8	(34)	5.8	(53)
% to total store sales	1.1	(87)	1.3	(34)	0.9	(53)
% change in sales 1982/1981	+ 5.9	(72)	+ 5.3	(27)	+ 5.9	(45)
Markdowns-% of sales	2.8	(51)	1.5	(18)	3.7	(33)
Inventory turnover	2.3	(44)	2.3	(17)	2.3	(27)

Note: Figures in parentheses are the numbers of firms reporting data.

Source: Menswear Retailers of America, Business Newsletter Section II, 1982 Annual Business Survey, Men's Store Operating Experiences

RETAIL MERCHANDISING & OPERATING RESULTS

Men's Hosiery Departments

Men's Hosiery Department Merchandising & Operating Results, 1982
Compared With Total Men's Wear Departments
In Department Stores with Annual Sales Over $1 Million
(Selected Median Results)

	Total Adult Male Apparel	Men's Hosiery
	(97)	(13)*
Cumulative markon	50.5	49.5
Markdowns - % of net retail sales	14.1	2.9
Gross margins (incl. cash discounts)	43.2	47.8
Stock turns (times) at retail	2.7	3.3
Net sales % change from 1981	+ 6.5	nr
Net sales % of adult male apparel	100.0	3.1
$ sales per sq. ft. of selling space (main or largest selling unit)	184.7	nr

* Number of firms reporting. (It should be noted that only 13 department store companies broke out the data on men's hosiery. This compares with 90 reporting on women's hosiery).

nr - not reported

Source: National Retail Merchants Association: Department Store & Specialty Store Merchandising & Operating Results of 1982.

BUYING HABITS

The pattern in consumer purchases of apparel items is traced by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. Data are based on purchase records of a nationwide representative sample of 6,500 families. The following information summarizes detailed information on hosiery purchases reported by NPD in the Textile and Apparel Market Index.

Women's & Girls' Hosiery/Legwear

Distribution of Reported Hosiery/Legwear Purchases, 1980, 1981, 1983

	Pairs			Expenditures		
	1983	1981	1980	1983	1981	1980
Women, age 14 & older						
Total hosiery/legwear purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Pantyhose, total	45.9	45.6	43.7	56.4	59.1	60.1
Panty top	17.7	19.0	18.1	22.1	25.7	25.8
Control top	4.9	3.9	3.9	9.1	7.0	8.0
Sheer/nude top	14.6	13.3	13.0	15.3	15.1	15.0
Regular top	8.7	9.4	8.7	9.9	11.3	11.3
Knee-high hosiery	24.8	26.3	26.5	8.5	10.3	10.7
Socks	11.0	9.4	7.6	9.3	7.4	6.2
Other hosiery	15.5	16.7	20.8	15.0	13.5	17.0
Leotards/tights/bodysuits	2.8	2.0	1.4	10.9	9.7	6.0

(continued)

BUYING HABITS

Women's & Girls' Hosiery/Legwear

Distribution of Reported Hosiery/Legwear Purchases, 1980, 1981, 1983
(continued)

	Pairs			Expenditures		
	1983	1981	1980	1983	1981	1980
Girls, age 13 & younger						
Total hosiery/legwear purchases	na	100.0%	100.0%	na	100.0%	100.0%
Pantyhose		7.3	6.6		7.4	6.0
Panty top		2.2	1.6		2.9	1.8
Control top		*	*		*	*
Sheer/nude top		3.2	3.2		2.8	2.7
Regular top		1.9	1.8		1.7	1.5
Knee-high hosiery		6.9	7.8		5.0	6.5
Knee socks		36.6	37.8		34.0	33.5
Other socks		37.2	36.5		27.8	27.2
Other hosiery		0.9	0.3		0.7	0.3
Leotards, tights, bodysuits		11.1	10.9		25.1	26.4

* Less than 0.1%
na - not available

Source: NPD Special Industry Services,
Textile and Apparel Market Index

Distribution of Reported Purchases of Selected Types of Hosiery/Legwear By Place of Purchase & By Price Category, 1983

	Women's Pantyhose				Women's Knee-high Hosiery	
	Panty Top		Sheer/Nude Top			
	Pairs	Expends.	Pairs	Expends.	Pairs	Expends.
Total reported purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Retail Outlet Type						
Department stores	11.5	15.8	9.7	14.8	4.2	6.8
Mass mdsrs. (incl. Sears, Penney, Ward, K-mart)	20.6	20.5	10.7	10.8	32.7	29.8
Discount stores	15.5	13.2	17.7	15.5	16.7	15.1
Specialty stores	3.6	4.2	7.4	8.4	2.1	3.4
Grocery stores/supermarkets	21.4	21.5	28.2	27.9	18.9	21.1
Variety stores	3.0	2.6	4.1	2.9	7.2	6.4
Drug stores	7.4	6.8	10.8	9.2	11.4	9.3
Other	17.0	15.4	11.4	10.5	6.8	8.1

(continued)

Women's & Girls' Hosiery/Legwear

Distribution of Reported Purchases of Selected Types of Hosiery/Legwear By Place of Purchase & By Price Category, 1983

(continued)

	Women's Pantyhose				Women's Knee-high Hosiery	
	Panty Top		Sheer/Nude Top			
	Pairs	Expends.	Pairs	Expends.	Pairs	Expends.
Total reported purchases (cont'd.)						
Price Paid						
Under $1.49	46.1	24.9	56.3	33.7	97.5*	89.4
$1.50 to $1.99	20.5	19.9	19.4	21.6	2.5	10.6
$[illegible].00 to $2.99	22.2	30.2	16.4	25.7		
$3.00 to $4.99	9.9	20.0	7.1	15.7		
$5.00 & over	1.3	5.0	0.8	3.3		

	Girls' Hosiery (Selected Types)					
	Knee Socks		Other Socks		Leotards/Tights Body Suits	
	Pairs	Expends.	Pairs	Expends.	Pairs	Expends.
Total reported purchases	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Retail Outlet Type						
Department stores	10.3	11.1	9.0	10.5	4.1	7.8
Mass mdsrs. (incl. Sears, Penney, K-mart)	29.6	32.6	41.9	37.8	26.9	18.7
Discount stores	28.9	27.4	28.5	26.7	25.8	19.6
Specialty stores	5.5	7.4	5.2	8.3	10.2	15.2
Variety stores	8.2	8.3	7.3	7.2	1.6	1.1
Grocery stores/supermarkets	5.7	4.4	2.4	2.4	23.0	24.9
Drug stores	4.1	1.7	1.1	1.2	1.2	1.8
Other	7.7	7.1	4.6	5.9	7.2	10.9
Price Paid						
Less than $1.00	72.6	51.6	71.5	52.8	na	na
$1.00 to $1.99	21.2	31.8	24.6	35.5		
$2.00 to $2.99	5.5	13.9	2.6	6.4		
$3.00 to $4.99	0.7	2.7	1.1	3.9		
$5.00 & over	--	--	0.2	1.4		

* 62% of knee-high hosiery purchases were priced at under 50 cents per pair and this price bracket represented 37% of reported dollar expenditures.

Source: NPD Special Industry Services,
Textile and Apparel Market Index.

BUYING HABITS

Teen Girls' Hosiery

In September 1982 Seventeen Magazine conducted a survey on apparel purchases made by teenage girls in preparation for going back to school. Results of the survey were projected to a total U.S. population of 8,655,000 teenage female students.

Hosiery Purchases For Back-To-School Wardrobes

	% of Total Purchasing Hosiery	Purchases		Expenditures	
		Pairs (000)	%	Thous. $	%
Total hosiery purchases	86.2%	62,687	100.0%	$167,796	100.0%
Socks - knee-length	45.8	17,437	27.8	40,977	24.5
- ankle	33.4	10,888	17.4	22,865	13.6
- crew	11.9	3,829	6.1	8,883	5.3
Pantyhose	68.2	15,691	25.0	37,481	22.4
Stockings - knee-length	21.2	6,731	10.7	12,654	7.5
- other	21.1	4,680	7.5	10,934	6.5
Leotards, tights	20.3	3,044	4.9	30,105	17.9
Body stockings	2.5	387	0.6	3,897	2.3

Source: Seventeen's Back-To-School Study, 1983

In May 1983 Seventeen Magazine conducted a survey among their panel of teenage girls on purchases for spring wardrobes, including usual place of purchase. Department stores were most frequently mentioned in regard to hosiery, followed by drug stores.

Usual Place of Purchase of Hosiery/Pantyhose
(Base: All Girls)

Total purchasing	100.0%*
Department store	40.8
Drug store	22.7
Supermarket	19.7
Discount store	16.6
Boutique/specialty store	6.7
Variety store	5.8
Other (shoe store, mail order, etc.)	0.7

* Adds to more than 100% due to multiple mentions.

Source: Seventeen's 1983 Spring Apparel Study

BUYING HABITS

Teen Girls' Hosiery

A survey of teenage girls on sports activity and related subjects was conducted by Seventeen Magazine in May 1982 which developed information on leotards purchased or received in the past year. Results projected to the total U.S. teenage female population are noted below. About two-thirds of pantyhose owned had been purchased by the teenage girl; the balance were gifts.

Ownership & Purchases of Leotards

Total teenage girls personally owning leotards	44.5%
Total number bought in the past year (000)	11,578
Total annual expenditure (000)	$79,398

Source: Seventeen's Sports Survey 1982

Men's Hosiery

The trend noted in recent years toward more casual hosiery, and apparel in general, away from dressier attire for men continued in 1983. According to data compiled by NPD Special Industry Services in the Textile and Apparel Market Index which tracks purchases reported by a nationwide, representative sample of 6,500 families, purchases of men's dress socks dropped from about 31% of total hosiery purchases in 1980 to about 26% in 1983. Athletic socks in the same period went up from 24% to over 32%.

Distribution of Reported Men's Hosiery Purchases by Type, 1980 - 1983

	Based on Pairs Purchased			Expenditures
	1983	1981	1980	1983
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Type of men's hosiery:				
Dress socks	25.9	28.9	31.3	30.4
Support socks	1.2	1.3	1.5	2.2
Casual socks	23.1	23.0	22.7	21.3
Athletic socks	32.3	25.5	23.8	30.2
Work socks	13.7	17.3	17.7	12.1
Other socks	3.7	4.0	3.0	3.9

Source: NPD Special Industry Services,
Textile and Apparel Market Index.

BUYING HABITS

Men's Hosiery

Distribution of Reported Purchases of Hosiery For Men Age 17 & Older
By Place of Purchase & By Price Classification, 1982, 1983

	1983		1982	
	Pairs	Expends.	Pairs	Expends.
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Outlet Type				
Department stores	13.5	18.6	13.0	18.6
Mass mdsrs. (incl. Sears, Ward, Penney, K-mart)	35.4	32.4	34.7	31.4
Discount stores	25.1	21.1	25.1	22.0
Specialty stores	5.7	8.1	4.0	5.3
Variety stores	6.4	5.3	7.2	6.0
Grocery stores/supermarkets	2.0	3.1	4.8	4.1
Other	11.8	11.4	11.2	12.6
Price Paid				
Under $1.50	74.4	51.5	73.9	52.0
$1.50 to $1.99	11.6	15.2	13.3	17.7
$2.00 to $2.49	4.7	7.8	4.3	7.3
$2.50 or more	9.3	25.5	8.5	23.0

Source: NPD Special Industry Services,
Textile and Apparel Market Index.

Boys' Hosiery

Purchases of boys' hosiery reported in NPD's service tracing purchases among 6,500 nationally representative families showed the following distribution patterns in 1983 and 1982:

Distribution of Boys' Hosiery Purchases by Type, 1983

	Pairs	Expenditures
Total reported purchases	100.0%	100.0%
Dress socks	5.9	5.6
Casual socks	33.9	38.7
Athletic socks	53.6	49.7
Other types	6.6	6.0

(continued)

BUYING HABITS

Boys' Hosiery

Distribution of Reported Purchases of Boys' Hosiery By Place of Purchase & By Price Classification

	1983		1982	
	Pairs	Expends.	Pairs	Expends.
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Outlet Type				
Department stores	8.5	10.0	10.4	11.3
Mass mdsrs. (Sears, Penney, Ward, K mart)	43.3	40.5	42.0	40.1
Discount stores	25.9	24.4	28.1	26.4
Specialty stores	3.8	5.9	3.8	5.6
Variety stores	7.7	6.8	6.0	5.5
Grocery stores/supermarkets	3.1	3.0	2.8	2.8
Other	7.8	9.4	6.9	8.2
Price Paid				
Under $1.00	70.4	52.4	68.1	50.0
$1.00 to $1.49	19.3	23.9	22.7	28.2
$1.50 or more	10.3	23.7	9.2	21.8

Source: NPD Special Industry Services, Textile and Apparel Market Index.

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. ($15.00) (1983 Edition available now -- 1984 Edition will be available in July, 1984)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included. (May)

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

RETAILING/MERCHANDISING TRENDS: Covers trends in sales of specific retail outlet types, competitive developments in retailing (such as off-price retailing, franchising, designer names, private labels). Trends in number of outlets by size; regional developments in retailing. (December)

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1984, $15.00) (July)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label. (September)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers. (March)

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Men's Sportswear, Casual Wear and Jeans

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MEN'S SPORTSWEAR, CASUAL WEAR, JEANS & ACTIVEWEAR

Market Trends

Following a strong 3% gain in 1983 unit sales, men's wear sales in 1984 are expected to rise 2.5% in quantity, according to Kurt Salmon Associates, management consultants. Sportswear will be the dominant force in this upsurge, with sales of men's non-tailored outerwear expected to jump 8% over 1983. Other significant sales increases are expected to be registered by men's sweaters (up 6%) and slacks (up 5%).

Much of the excitement in the men's wear industry continues to stem from active sportswear, although the growth rate has slowed. The active influence has been expanded into other sportswear categories, and the term "street active" has become part of the industry vernacular. The active look has become so pervasive that the warm-up suit has become known as "the leisure suit of the '80's". Manufacturers, and retailers, keenly aware that the market for street activewear is considerably larger than the market for authentic activewear, have gone after the mainstream sportswear customer by adding more fashion to their active lines and down-playing the splashy colors of past seasons. They want to promote the concept of activewear as everyday wear.

In order to salvage market share in the maturing activewear market, manufacturers' are not only diversifying their merchandise mixes and producing new products, but they are also attempting to expand their patterns of distribution. Established manufacturers as well as hordes of new suppliers and importers now involved in the market are competing in a category now experiencing a 10 to 20% growth rate rather than the triple-digit gains of recent years.

Another mature market is the men's jeans classification and here, too, fashion has become increasingly important to sales growth. With the consumers' taste turning to dress and casual slacks rather than jeans, the injection of fashion elements such as pleated denim, into the familiar jeans construction has helped stem the sales decline. In 1983, men's jean sales were flat compared with 1982's 182 million pairs, which was 6.2% below 1981 sales. Fashion jeans accounted for 12% of sales in 1983, but are expected to rise to 20% over the next few years. According to industry sources, growth in the jeans market will be confined to between 1% and 3% annually through the '80's.

In April 1984 the major producer of jeans, Levi Strauss, announced a major attack on the activewear (including both participant and spectator) market in which it had already amassed sales of $60 million in 1983 to rank among the top 10 branded sellers of activewear (men's, women's and children's). Special efforts are to be made to broaden distribution through the smaller specialty active shops, such as running stores.

After several mild winters, men's outerwear as well as ski wear sales were revitalized during the winter of 1983-84. For fall 1984, outerwear manufacturers are relying on a host of new styles, fabrics and treatments to maintain the sales momentum. Combining leather, wool and/or cotton in one garment, known as fabric mixing, will be one of 1984's most prevelant trends. Wool and leather outerwear is also expected to do well.

Market Trends

The increased emphasis on fitness in American society will lead to a large increase in fitted woven sport shirts for the fall 1984 season, as the market perceives a softening in the knit sport shirt category.

GENERAL INDUSTRY STATISTICS

Between 1972 and 1983, the men's and boys' shirts and nightwear industry had a compound annual growth rate of 5.5% in current dollars but as measured in constant 1972 dollars, the rate declined (-0.5%), according to the Bureau of Industrial Economics. The compound annual growth rate for the men's and boys' separate trousers industry during this same period was 2.3% in current dollars and -3.5% in constant dollars.

The total value added by manufacture in the shirt and nightwear industry was an estimated $2,001 million in 1983, 10.0% more than the 1981 value added total reported in the Annual Survey of Manufactures (ASM). For the separate trousers industry, the estimated value added total reported in the 1984 U.S. Industrial Outlook was $1,184 million, only 4.6% higher than in 1981.

Estimated Value of Industry Shipments in the Men's & Boys' Separate Trousers & Shirts & Nightwear Industries, 1982, 1983

	Value of Industry Shipments (millions of $) 1983(e)	Value of Industry Shipments (millions of $) 1982(e)	% Change 1983/82	% Change in Constant (1972) $ 1983/82
Men's & boys' shirts & nightwear (SIC 2321)	$3,783.3	$3,574.6	+ 5.8%	+ 1.7%
Men's & boys' separate trousers (SIC 2327)	2,251.4	2,191.7	+ 2.7	- 1.9

(e) = estimated.

Source: U.S. Department of Commerce
Bureau of Industrial Economics
1984 U.S. Industrial Outlook

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent for which information is available covering the year 1977. Results of the 1982 census will be available in mid-1984. During intercensal periods, the Bureau conducts annual surveys covering a sample of manufacturers to develop estimates on key measurements of manufacturing activity.

Men's sportswear/casual wear is not a distinct, separately reported industry. Merchandise of this type is combined in several industry classifications under the Standard Industrial Classification system, on which the following tables are based.

GENERAL INDUSTRY STATISTICS

Men's & Boys' Clothing, n.e.c. (SIC 2329*)

(Primarily Sportswear/Outerwear)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments**	585	615	638	- 4.9%
With 20 or more employees	381	400	407	- 4.8
Total employment (thous.)	42.8	43.4	45.6	- 1.4
Production workers (thous.)	36.7	37.2	39.1	- 1.3
Payroll (mil. $)	$395.2	$ 371.2	$ 343.3	+ 6.5
Value added by manufacture (mil. $)#	776.1	745.7	695.1	+ 4.1
Value of industry shipments (mil. $)##	1,442.9	1,331.1	1,263.9	+ 8.4
Capital expenditures, new (mil. $)	15.3	15.1	15.3	+ 1.3

Knit Outerwear Mills (SIC 2253*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments**	820	876	884	- 6.4%
With 20 or more employees	442	473	459	- 6.5
Total employment (thous.)	64.7	67.1	61.9	- 3.6
Production workers (thous.)	55.3	57.9	53.4	- 4.5
Payroll (mil. $)	$ 682.3	$ 637.4	$ 548.1	+ 7.0
Value added by manufacture (mil. $)#	1,440.7	1,339.1	1,096.0	+ 7.6
Value of industry shipments (mil. $)##	2,807.8	2,571.7	2,220.8	+ 9.2
Capital expenditures, new (mil. $)	50.0	48.5	35.6	+ 3.1

Leather & Sheep-Lined Clothing (SIC 2386*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments**	151	156	169	- 3.2%
With 20 or more employees	62	55	64	+ 12.7
Total employment (thous.)	7.5	8.0	7.0	- 6.2
Production workers (thous.)	6.8	7.2	6.3	- 5.6
Payroll (mil. $)	$ 64.1	$ 63.5	$ 56.3	+ 0.9
Value added by manufacture (mil. $)#	103.4	100.8	93.4	+ 2.6
Value of industry shipments (mil. $)##	203.4	215.3	210.4	- 5.5
Capital expenditures, new (mil. $)	2.2	0.7	1.1	+214.3

GENERAL INDUSTRY STATISTICS

Men's & Boys' Shirts & Nightwear (SIC 2321*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments**	758	787	779	- 3.7%
With 20 or more employees	581	593	597	- 2.0
Total employment (thous.)	103.3	115.9	120.7	- 10.9
Production workers (thous.)	91.8	103.9	108.4	- 11.6
Payroll (mil. $)	$ 916.8	$ 931.0	$ 885.5	- 1.5
Value added by manufacture (mil. $)#	1,947.3	1,813.5	1,633.5	+ 7.4
Value of industry shipments (mil. $)##	3,681.1	3,479.5	3,251.0	+ 5.8
Capital expenditures, new (mil. $)	46.3	42.5	36.2	+ 8.9

Men's & Boys' Separate Trousers (SIC 2327*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments**	376	393	419	- 4.3%
With 20 or more employees	279	287	302	- 2.8
Total employment (thous.)	59.1	64.1	66.6	- 7.8
Production workers (thous.)	51.4	55.8	57.8	- 7.9
Payroll (mil. $)	$ 543.8	$ 528.1	$ 507.7	+ 3.0
Value added by manufacture (mil. $)#	1,132.3	1,102.0	1,050.7	+ 2.7
Value of industry shipments (mil. $)##	2,152.1	2,006.6	1,980.5	+ 7.2
Capital expenditures, new (mil. $)	22.5	20.5	15.2	+ 9.8

(e) = estimated
na = not available.
n.e.c. = not elsewhere classified.

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made, as shown below:

SIC 2329 covers manufacturers specializing in the production of men's and boys' heavy outerwear coats and jackets, swimwear and athletic shorts, ski and snow pants and other outerwear not elsewhere classified made in cut-and-sew plants.

SIC 2253 covers mills primarily engaged in knitting outerwear (men's, women's, children's) from yarn or in manufacturing outerwear from knit fabric produced in the same mill.

SIC 2386 covers manufacturers primarily engaged in manufacturing leather and sheep-lined garments for men, boys, women and children.

SIC 2321 covers establishments primarily engaged in the manufacture of men's, youths' and boys' shirts (including dress, polo and sport shirts, but not including work shirts) and nightwear cut and sewn from purchased woven or knit fabric.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

SIC 2327 covers establishments primarily engaged in the manufacture of men's, youths' and boys' separate trousers and slacks.

**Each business location is counted as a separate establishment. Data on number of establishments include only those with payrolls, as reported in County Business Patterns.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries, (called "product shipments") is covered on page 14.

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1979, 1980, 1981.

Employment & Earnings

The men's and boys' shirts and nightwear industry employed an average of 91.5 thousand workers in 1983, down 0.6% from 1982. While the number of production workers remained static at 78.7 thousand, average weekly earnings rose 6.4% to $173.85. In the men's and boys' separate trousers industry, average weekly wages increased 9.1% for production workers, although their numbers fell 0.5% to 56.9 thousand in 1983.

The Bureau of Labor Statistics uses a different methodology in compiling employment data than that followed by the Census Bureau; accounting for differences in reported figures by these sources for 1981.

Employment & Earnings in the Men's Sportswear Industry, 1981 - 1983

	Annual Averages			% Change
	1983	1982	1981	1983/1982
Knit outerwear mills (SIC 2253)				
All employees (thous.)	63.6	65.6	70.5	- 3.0%
Production workers (thous.)	54.3	55.7	59.9	- 2.5
Average weekly earnings	$204.79	$191.46	$188.87	+ 7.0
Average hourly earnings	5.52	5.26	5.05	+ 4.9
Average weekly hours	37.1	36.4	37.4	+ 1.9

(continued)

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in the Men's Sportswear Industry, 1981 - 1983
(continued)

	Annual Averages 1983	1982	1981	% Change 1983/1982
Men's & boys' shirts & nightwear (SIC 2321):				
All employees (thous.)	91.5	92.1	97.6	- 0.6%
Production workers (thous.)	78.7	78.8	83.9	- 0.1
Average weekly earnings	$173.85	$163.33	$160.92	+ 6.4
Average hourly earnings	4.75	4.64	4.47	+ 2.4
Average weekly hours	36.8	35.2	36.0	+ 4.5
Men's & boys' separate trousers (SIC 2327)				
All employees (thous.)	65.6	65.8	70.9	- 0.3
Production workers (thous.)	56.9	57.2	61.9	- 0.5
Average weekly earnings	$184.74	$169.27	$168.59	+ 9.1
Average hourly earnings	5.02	4.85	4.67	+ 3.5
Average weekly hours	36.8	34.9	36.1	+ 5.4

Source: U.S. Bureau of Labor Statistics
Employment & Earnings

Concentration in the Industry

Number of Men's & Boys' Sportswear Manufacturing Establishments By Employment Size, 1981

	Men's & Boys' Shirts & Nightwear (SIC 2321)	Separate Trousers (SIC 2327)	Clothing, n.e.c. (SIC 2329)
Total establishments	758	376	585
Number of employees:			
Under 10 employees	104	72	120
10-49 employees	202	62	216
50-99 employees	119	52	119
100-499 employees	313	170	125
500 or more employees	20	20	5

	Knit Outerwear Mills (SIC 2253)	Leather & Sheep-Lined Clothing (SIC 2386)
Total establishments	820	151
Number of employees:		
Under 10 employees	234	67
10-49 employees	355	53
50-99 employees	105	17
100-499 employees	106	14
500 or more employees	20	--

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census
County Business Patterns 1981.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Value of Industry Shipments From Men's & Boys' Sportswear Plants
With 20 or More Employees, 1982

	No. of Establishments With 20+ Employees	No. of Establishments With 100+ Employees	No. of Employees (Thous.)	Industry Shipments Mil. $	Industry Shipments % from Plants With 100+ Employees
Knit outerwear mills (SIC 2253)	452	189	64.2	$2,649.6	81%
Men's & boys' shirts & nightwear (SIC 2321)	591	411	121.9	3,892.1	92
Men's & boys' separate trousers (SIC 2327)	376	287	86.6	2,247.3	94
Men's & boys' clothing, n.e.c. (SIC 2329)	455	213	59.1	1,485.9	79

n.e.c. = not elsewhere classified.

Source: Sales & Marketing Management
Survey of Industrial & Commercial Buying Power
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Location of the Industry

Pending the release of data from the 1982 Census, the latest information on industry shipments by state is contained in the 1978 Annual Survey of Manufactures. According to this source, knit outerwear manufacturers in the five largest producing states accounted for 70% of the industry's shipment value. In the men's and boys' shirts and nightwear industry, the output of manufacturers in seven states represented 68.7% of the total shipment value of the industry.

Value of Industry Shipments in the Men's & Boys' Sportswear Industry
By Leading States, 1978

	Employment (Thous.)	Value Added by Manufacture (Mil. $)	Value of Industry Shipments (Mil. $)
Knit outerwear mills (SIC 2253)			
U.S. total	72.1	$ 1,202.8	$ 2,333.3
Leading states:			
New York	16.6	238.9	559.2
Pennsylvania	12.1	252.6	449.2
Virginia	7.5	174.4	279.4
North Carolina	8.6	116.4	248.2
Massachusetts	2.6	53.2	98.7
Leading states, total	47.4	835.5	1,634.7
% of U.S. total	65.7%	69.5%	70.0%

(continued)

GENERAL INDUSTRY STATISTICS

Location of the Industry

Value of Industry Shipments in the Men's & Boys' Sportswear Industry By Leading States, 1978

(continued)

	Employment (Thous.)	Value Added by Manufacture (Mil. $)	Value of Industry Shipments (Mil. $)
Men's & boys' shirts & nightwear (SIC 2321)			
U.S. total	116.0	$1,630.2	$3,170.3
Leading states:			
New York	6.0	150.3	540.9
Alabama	15.4	182.3	356.9
North Carolina	13.0	140.8	287.9
Tennessee	14.6	137.7	278.7
Georgia	9.8	134.8	241.3
Pennsylvania	10.2	123.9	240.0
California	5.7	119.3	231.3
Leading states, total	74.7	989.1	2,177.0
% of U.S. total	64.4%	60.7%	68.7%
Men's & boys' separate trousers (SIC 2327)			
U.S. total	65.7	983.0	1,946.6
Leading states:			
New York	2.7	118.9	310.3
Georgia	10.1	126.1	245.4
Tennessee	6.1	71.3	119.9
Mississippi	4.5	51.6	112.0
Alabama	4.5	54.5	84.5
Arkansas	3.1	45.7	73.8
Leading states, total	31.0	468.1	945.9
% of U.S. total	47.2%	47.6%	48.6%
Men's & boys' clothing, n.e.c. (SIC 2329)			
U.S. total	46.8	624.6	1,184.4
Leading states:			
New York	4.3	71.4	185.3
Tennessee	3.3	40.3	85.0
California	3.1	42.1	81.0
Pennsylvania	3.8	44.3	80.1
Leading states, total	14.5	198.1	431.4
% of U.S. total	31.0%	31.7%	36.4%

n.e.c. = not elsewhere classified.

Source: Based on U.S. Bureau of the Census
Annual Survey of Manufactures, 1978

PRODUCTION

Preliminary 1983 production figures (subject to revision) compiled by the Census Bureau indicate that U.S. production of men's jeans rose by almost a third, to 172.9 million pairs, compared with 1982. Domestic production of jean-cut casual slacks plunged 28% from the 1982 level.

Production of knit and woven sport shirts in 1983 fell 4.5% and 28.8%, respectively, versus the previous year, according to the preliminary report.

Production of Specified Types of Men's Sportswear, 1982, 1983

	Production (Thous. Units)		% Change
	1983(p)	1982	1983/1982
Dress & sport trousers	109,197	111,749	- 2.3%
Jeans & dungarees	172,940	130,465	+ 32.6
Jean-cut casual slacks	29,961	41,834	- 28.4
Sport shirts, total (in thous. dozen)	32,469	35,060	- 7.4
Knit (thous. dozen)	29,462	30,836	- 4.5
Woven (thous. dozen)	3,007	4,224	- 28.8

(p) = preliminary

Source: U.S. Bureau of the Census
Current Industrial Reports
M23(83)-12

Percent of Men's Sportswear Production by Months, 1983

	Dress & Sport Trousers	Jeans & Dungarees	Jean-cut Casual Slacks	Sport Shirts		Sweaters*
				Knit	Woven	
Total production	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Percent of total done in:						
January	7.4	6.7	6.8	8.4	10.4	5.6
February	8.4	7.2	7.0	8.0	7.6	6.0
March	9.4	8.4	6.8	9.1	7.8	6.0
April	8.5	8.4	5.7	8.1	7.5	7.3
May	7.9	8.8	7.1	8.8	7.5	8.1
June	9.3	10.8	12.0	9.1	7.5	8.3
July	6.5	8.2	10.9	6.3	8.4	7.8
August	9.1	8.8	9.9	8.2	8.5	10.8
September	8.4	9.9	8.9	8.7	8.5	10.5
October	8.9	8.3	8.9	8.5	8.9	12.0
November	9.3	9.4	11.2	9.0	9.6	9.5
December	6.9	5.1	4.8	7.9	7.7	8.0

*Shipments

Source: Based on U.S. Bureau of the Census
Current Industrial Reports, M23(83)-12

PRODUCTION

In the annual CIR on apparel production for 1982, the Census Bureau included figures obtained from 90 establishments which did not report 1981 production totals. Results for the two years, therefore, are not exactly comparable. In the men's sportswear classification, the new establishments represented a low of 0.3% of men's and boys' athletic shorts production in 1982 to a high of 4.7% of knit outerwear sport shirts. If comparability has been affected by more than 1%, only 1982 production data is shown in the following table.

Except for light nontailored outer jackets for men, which remained on par with 1981 production levels, the remaining sportswear categories tracked by the Census Bureau showed declines in production during 1982. Men's separate dress and sport trousers fell 5.5% below U.S. production in 1981. However, trousers produced at price points of $9 and up (manufacturers' prices) gained 6.0% and accounted for 77% of total production. Production of jeans and dungarees dropped 7.4% while knit outerwear sport shirt production was off 5.8% compared with the previous year.

Production of Specified Men's Sportswear Items
By Fabric & Construction, 1981, 1982

	Production (Thous. Units)		% Change
	1982	1981	1982/1981
Casual (nontailored) suits	79	321	- 75.4%
Woven fabric:			
All cotton & chiefly cotton	na	101	--
All man-made & chiefly man-made	na	165	--
Other fabric	na	42	--
Knit fabric	na	13	--
Casual (nontailored) sport coats	421	452	- 6.9
Woven fabric:			
All cotton & chiefly cotton	130	150	- 13.3
All man-made & chiefly man-made	87	69	+ 26.1
Other fabric	140	113	+ 23.9
Knit fabric	64	120	+ 46.7
Separate dress & sport trousers, incl. uniform	111,749	118,215	- 5.5
By price (per unit):			
Under $4.25	920	718	+ 28.1
$4.25 to $5.00	1,036	742	+ 39.6
$5.00 to $8.99	23,604	31,078	- 24.0
$9.00 to $12.49	47,963	45,126	+ 6.3
$12.50 & over	37,828	35,839	+ 5.5
Not specified	398	4,712	- 91.5
By fabric:			
Woven fabric:			
All cotton & chiefly cotton	13,772	12,283	+ 12.1
Man-made/wool blends, chiefly man-made	11,745	9,052	+ 29.7
All man-made & chiefly man-made	64,125	72,772	- 11.9
All wool & chiefly wool	6,548	6,431	+ 2.4
Other fabric	6,482	6,049	+ 7.2

(continued)

Production of Specified Men's Sportswear Items
By Fabric & Construction, 1981, 1982
(continued)

	Production (Thous. Units) 1982	1981	% Change 1982/1981
Separate dress & sport trousers (cont'd.)			
Knit fabric:			
All cotton & chiefly cotton	na	na	--
All man-made & chiefly man-made	7,645	7,689	- 0.6%
Other fabric	na	na	--
Not specified	1,396	3,939	- 64.6
Uniform trousers	5,934	6,281	- 5.5
Jeans & dungarees	130,465	140,859	- 7.4
All cotton & chiefly cotton	120,485	130,232	- 7.5
All man-made & chiefly man-made	7,969	8,674	- 8.1
Not specified	2,011	1,953	+ 3.0
Jean-cut casual slacks	41,834	51,078	- 18.1
Woven fabric			
All cotton & chiefly cotton	32,646	38,949	- 16.2
All man-made & chiefly man-made	9,042	9,268	- 2.4
Other fabric	146	2,861	- 94.9
Shorts, excluding athletic shorts	3,973	4,707	- 15.6
By fabric:			
All cotton & chiefly cotton	2,558	2,655	- 3.6
All man-made & chiefly man-made	1,167	1,932	- 39.6
Other fabric	na	na	--
Not specified	248	120	+106.7
By construction:			
Woven fabric	3,770	4,496	- 16.1
Knit fabric	74	108	- 31.5
Not specified	129	103	+ 25.2
	(Thous. Dozen)		
Heavy nontailored outer jackets except ski, including uniform	1,334	1,400	- 4.7
By construction:			
Woven fabric	1,015	1,024	- 0.9
Knit fabric	156	224	- 30.4
Not specified	163	152	+ 7.2
By fabric:			
All cotton & chiefly cotton	334	274	+ 21.9
All man-made & chiefly man-made	741	833	- 11.0
All wool & chiefly wool	64	79	- 19.0
Other fabric	na	57	--
Not specified	195	157	+ 24.2
Uniform jackets	141	173	- 18.5

(continued)

Production of Specified Men's Sportswear Items
By Fabric & Construction, 1981, 1982
(continued)

	Production (Thous. Dozen)		% Change
	1982	1981	1982/1981
Light nontailored outer jackets, including uniform	2,068		+ 0.1%*
By construction:			
Woven fabric	1,036		
Knit fabric	659		
Not specified	373		
By fabric:			
All cotton & chiefly cotton	172		
All man-made & chiefly man-made	1,547		
All wool & chiefly wool	57		
Other fabric	14		
Not specified	278		
Woven sport shirts	4,224		- 22.0*
All cotton & chiefly cotton	1,069		
All man-made & chiefly man-made	2,762		
Other fabric	62		
Not specified	331		
Knit sport shirts, except sweatshirts**	30,836		- 5.8*
By fabric:			
All cotton & chiefly cotton	10,356		
All man-made & chiefly man-made	18,055		
All wool & chiefly wool	na		
Other fabric	591		
Not specified	1,834		
By type:			
Full open front shirts	690		
Partial front opening (golf, polo-type)	8,205		
T-shirts made for outerwear, incl. tanktops	20,054		
Not specified	1,887		
Sweaters, including sweater vests, knit cardigans & pullovers	3,040		- 9.6*
All cotton & chiefly cotton	121		
All man-made & chiefly man-made	1,590		
All wool & chiefly wool	773		
Other fiber Not specified	556		

(continued)

Production of Specified Men's Sportswear Items By Fabric & Construction, 1981, 1982

(continued)

	Production (Thous. Dozen) 1982	Production (Thous. Dozen) 1981	% Change 1982/1981
Men's & boys' active sportswear:			
Athletic shorts, incl. jogging shorts & tennis shorts	4,627	3,739	+ 23.7%
Sweatshirts	4,818	5,517	- 12.7
Sweat pants	1,888	na	--
Warmup or jogging suits	1,314	1,681	- 21.8
Swimwear	1,943	1,843	+ 5.4
Woven fabric	1,172		- 10.8*
Knit fabric	246		
Not specified	525		

* Represents percentage change after adjustment for comparability.
**Includes turtleneck and pullover crew neck knit shirts.

Source: U.S. Bureau of the Census
Current Industrial Reports,
Men's & Boys' Outerwear, MA23(82)-1

SHIPMENTS

In the 1984 U.S. Industrial Outlook, the 1983 value of shipments of men's and boys' separate trousers was estimated by the Bureau of Industrial Economics at $1.7 billion, a gain of 1.7% over 1982. But in constant 1972 dollars, the shipment value fell at a compound annual rate of 3.6% between 1972 and 1983. Similarly, the Bureau expected the 1983 shipment value of men's and boys' shirts and nightwear to be 5.5% higher in current dollars than the previous year but from 1972 to 1983 the constant dollar shipment value declined at a 0.5% compound annual rate.

Shipments of men's sportswear items reported on by the Census Bureau in the latest available annual Current Industrial report placed the value in 1982 at $6.7 billion --down 2.3% from the comparable total in 1981.

Registering strong growth in the activewear area were athletic shorts which were up almost 19% in value in 1982 compared with 1981. Skiwear suffered from a lack of snow as well as depressed economic conditions in 1982, reflected in a drop of almost 9% in value of shipments of skiwear. However, trade reports indicated a strong year in skiwear, as well as other activewear in 1983.

Value of Shipments of Specified Men's Sportswear Items By All U.S. Manufacturers, 1981, 1982

(Millions of Dollars)

	1982	1981	% Change 1982/1981*
Men's sportswear, total of specified categories	$ 6,693.5	$6,854.3	- 2.3%
Casual (nontailored) suits	3.2	22.4	- 85.7
Casual (nontailored) sport coats	18.7	15.3	+ 22.2
Sport shirts, total	1,642.9	1,745.0	- 5.8
Woven	390.2	453.7	- 14.0
Knit, except sweatshirts**	1,252.7	1,291.3	- 3.0
Sweaters, including sweater vests, knit cardigans & pullovers	374.8	379.4	- 1.2
Trousers, slacks & shorts, total	3,314.3	3,358.2	- 1.3
Separate dress & sport trousers, including uniform	1,413.8	1,378.1	+ 2.6
Jeans & dungarees	1,396.3	1,430.6	- 2.4
Jean-cut casual slacks	475.8	519.1	- 8.3
Shorts, excluding athletic shorts	28.4	30.4	- 6.6
Heavy nontailored outer jackets, except ski, including uniform	352.0	350.0	+ 0.6
Light nontailored outer jackets, including uniform	267.3	263.8	+ 1.3
Active sportswear (men's & boys')	720.3	720.2	--
Athletic shorts, including jogging & tennis shorts	164.8	138.6	+ 18.9
Sweatshirts	269.8	278.0	- 2.9
Warmup or jogging suits	104.7	124.9	- 16.2
Swimwear	118.3	110.1	+ 7.4
Skiwear, including jackets & pants	62.7	68.6	- 8.6

* Figures for the two years are not exactly comparable due to the 1982 inclusion of 90 establishments, for which earlier information was not obtained. These new establishments generally represented 1%, but not more than 4.7% (knit outerwear sport shirts) of 1982 production.

**Includes turtleneck and pullover crew neck knit shirts.

Source: U.S. Bureau of the Census
Current Industrial Reports
Men's & Boys' Outerwear MA23E(82)-1

The trend in the past two years has been for a proliferation of manufacturers and importers into the activewear/sportswear market, while established suppliers have broadened their lines.

Leading U.S. Manufacturers of Specified Active Sportswear, 1982
(Including both men's & women's wear)

Tennis & Golf Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Robert Bruce	$ 60.0
Munsingwear	40.0
Jockey	33.0
Loomtogs/Fred Perry	23.5
Difini	16.0
Fila*	15.0
Newcombe Active Sportswear	12.5(e)

General Activewear

Leading Manufacturers	1982 Sales (Mil. $)
Izod	$450.0(e)
Bassett-Walker	240.0(e)
Tultex	231.4
Sale Knitting	210.0(e)
Jantzen	165.0(e)
Ocean Pacific	144.0
Catalina	105.0(e)

Ski Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Head**	$ 34.0(e)
Sport-Obermeyer	20.0
CB Sports	16.5
Roffe	13.0(e)
Skyr	10.1

Outdoor Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Woolrich	$106.0
Pacific Trail	63.1
Jan Sport	28.0
The North Face	22.0
Patagonia	15.0(e)

Bodywear/Exercise Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Danskin	$100.0(e)
Flexatard	22.0
Carushka	13.0
West Grove	9.0(e)

Athletic Footwear Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Adidas	$140.0(e)
Nike	96.9
Etonic	8.0(e)
New Balance	8.0(e)

Competitive Runningwear

Leading Manufacturers	1982 Sales (Mil. $)
Dolfin	$ 12.5
Sub-4	8.0
Bill Rodgers & Co.	6.5
Frank Shorter	3.1
Women on the Run	3.0

Competitive Swimwear

Leading Manufacturers	1982 Sales (Mil. $)
Speedo	$ 30.0
Arena	10.0
The Finals	3.2(e)
Hind-Wells	2.5
Ocean Pool	1.5(e)
Gulbenkian	1.5(e)

(e) = estimated.
* Also includes skiwear & swimwear.
**Also includes Head swimwear, tenniswear, runningwear & Tyrolia skiwear.

Source: SportStyle May 23, 1983

PRODUCER PRICE TRENDS

Producer (factory) prices of men's and boys' wear in 1983 averaged a 1.2% increase from 1982, almost identical to the 1.3% rise for all commodities. Among specific sportswear items tracked by the Bureau of Labor Statistics, men's lightwear outer coats jumped the most compared with 1982 (+6.0%) while men's chiefly cotton trousers decreased by 2.9%.

As of March 1984 factory prices for all men's and boys' apparel increased 0.2% from February prices and 2% from March 1983 prices according to the BLS.

Producer Price Index of Selected Men's Sportswear Items, 1982, 1983
(1967=100 unless otherwise specified)

	Annual Averages		% Change
	1983(p)	1982	1983/1982
All commodities	303.2	299.3	+ 1.3%
All apparel	196.8	194.4	+ 1.2
Men's & boys'	222.2	219.5	+ 1.2
Men's trousers, except uniform, chiefly cotton (Dec. 1981 = 100)	101.6	104.6	- 2.9
Men's trousers, except uniform, chiefly wool (Dec. 1981 = 100)	103.6	100.9	+ 2.7
Men's trousers, except uniform, other fabrics (Dec. 1981 = 100)	104.5	103.6	+ 0.9
Men's denim jeans & jean-cut casual slacks (Dec. 1981 = 100)	99.9	99.4	+ 0.5
Men's corduroy jeans & jean-cut casual slacks (Dec. 1981 = 100)	97.8	na	--
Men's jeans & jean-cut casual slacks*	102.8	na	--
Men's knit pullover golf apparel (Dec. 1977 = 100)**	131.1	131.4	- 0.2
Men's lightweight outer coat (Dec. 1977 = 100)	149.1	140.6	+ 6.0

(p) = preliminary.
* Average based on 8 months of 1983.
** Average based on 7 months of 1983.

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

According to the Bureau of Industrial Economics (1984 U.S. Industrial Outlook), imports of men's & boys' shirts and nightwear grew at a compound annual rate of 16.0% between 1972 and 1983. In 1983, these imports accounted for approximately 38.8% of apparent consumption in the U.S. (domestic shipments plus imports minus exports). Their import value was estimated at $1.8 billion, 5.4% higher than in 1982.

FOREIGN TRADE

Imports

Imports of men's and boys' separate trousers, estimated at $634 million in 1983, represented 27.2% of apparent consumption that year. Between 1972 and 1983, imports of these goods jumped at an 18.4% compound annual rate of growth.

As measured by the Census Bureau, 1983 imports of men's and boys' sportswear were valued at $2.1 billion, a 7.6% rise over 1982. Men's and boys' shirt imports constituted more than half of the total import value and, at $1.2 billion, gained 2.0% versus 1982. Imported knit shirts increased 18.7% in value to $575.3 million in 1983 while woven shirt imports fell in value by 9.1%.

Quantity & Value of Imports of Men's & Boys' Sportswear Items By Leading Countries of Origin, 1982, 1983

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Specified men's & boys' sportswear items, total	43,039.2	40,656.3	+ 5.9%	$2,074.7	$1,928.6	+ 7.6%
Trousers, slacks & shorts, total	10,372.0	8,056.0	+ 28.7	599.3	482.1	+ 24.3
Wool, not knit	274.5	235.0	+ 16.8	46.2	40.0	+ 15.5
China	91.5	75.1	+ 21.8	10.2	8.3	+ 22.9
Korea	91.4	69.2	+ 32.1	14.4	10.7	+ 34.6
Cotton, not knit	6,058.0	4,808.6	+ 26.0	368.3	309.4	+ 19.0
Hong Kong	2,019.6	1,923.6	+ 5.0	148.1	146.5	+ 1.0
China	1,064.9	575.5	+ 85.0	46.2	29.2	+ 58.2
Man-made fibers, not knit	4,039.5	3,012.4	+ 34.1	184.8	132.7	+ 39.3
Taiwan	2,114.7	1,726.2	+ 22.5	97.3	71.1	+ 36.8
China	841.7	580.9	+ 44.9	30.0	21.4	+ 40.2
Shirts, total	29,639.1	29,599.1	+ 0.1	1,241.0	1,216.8	+ 2.0
Not knit, total	15,759.1	17,550.8	- 10.2	665.7	732.1	- 9.1
Sport cotton corduroy	157.2	206.0	- 23.7	9.9	12.7	- 22.0
China	48.5	95.0	- 48.9	2.9	5.8	- 50.0
Sport, cotton except corduroy	4,662.6	5,388.3	- 13.5	211.7	231.3	- 8.5
Hong Kong	1,595.4	1,804.6	- 11.6	82.5	90.8	- 9.1
Wool	173.3	164.2	+ 5.5	14.0	13.0	+ 7.7
Korea	164.5	153.2	+ 7.4	12.9	11.6	+ 11.2
Man-made fibers	10,766.0	11,792.3	- 8.7	430.1	475.1	- 9.5
Korea	5,725.8	6,074.8	- 5.7	211.2	222.8	- 5.2
Taiwan	3,119.1	3,685.9	- 15.4	138.6	161.2	- 14.0
Knit, total	13,880.0	12,048.3	+ 15.2	575.3	484.7	+ 18.7
Cotton, nspf	7,452.5	6,111.0	+ 21.9	326.6	261.2	+ 25.0
Pakistan	1,486.1	1,033.3	+ 43.8	10.3	7.6	+ 35.5
Hong Kong	1,350.3	1,375.0	- 1.8	84.7	78.5	+ 7.9
Wool, nspf	78.8	59.9	+ 31.5	8.0	7.7	+ 3.9
Hong Kong	44.6	41.4	+ 7.7	4.6	5.3	- 13.2
Man-made fibers, nspf	6,348.7	5,877.4	+ 8.0	240.7	215.8	+ 11.5
Hong Kong	2,479.0	2,333.4	+ 6.2	90.9	81.2	+ 11.9
Taiwan	1,936.6	1,964.8	- 1.4	79.5	78.9	+ 0.8

(continued)

FOREIGN TRADE

Imports

Quantity & Value of Imports of Men's & Boys' Sportswear Items By Leading Countries of Origin, 1982, 1983

(continued)

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Sweaters, total	3,028.1	3,001.2	+ 0.9%	$ 234.4	$ 229.7	+ 2.0%
Wholly or in part cashmere, knit	21.9	20.9	+ 4.8	11.1	11.4	- 2.6
Hong Kong	4.4	4.4	--	2.2	2.1	+ 4.8
Sheep-like hair, except cashmere, knit	112.7	105.1	+ 7.2	12.9	11.4	+ 13.2
Hong Kong	42.6	46.3	- 8.0	5.0	5.2	- 3.8
Wool, nspf	921.8	894.3	+ 3.1	99.5	94.4	+ 5.4
Hong Kong	336.7	346.3	- 2.8	37.9	38.1	- 0.5
Cotton	150.8	127.6	+ 18.2	17.9	13.8	+ 29.7
Hong Kong	68.9	71.8	- 4.0	8.9	8.1	+ 9.9
Taiwan	19.0	11.5	+ 65.2	1.9	0.9	+111.1
Man-made fibers	1,820.9	1,853.3	- 1.7	93.0	98.7	- 5.7
Taiwan	733.4	605.5	+ 21.1	40.0	37.8	+ 5.8
Korea	606.3	665.7	- 8.9	29.9	33.8	- 11.5

nspf = not specially provided for.

* The C.I.F. (cost, insurance, freight) value represents the value of imports at the first port of entry into the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census
U.S. General Imports FT 135
December 1982, 1983

Exports

Exports of men's and boys' shirts and nightwear were valued at an estimated $101 million in 1983, according to the Bureau of Industrial Economics, 27.5% below the 1982 export value. Since 1972, exports in this category have risen at a compound annual rate of 14.9%.

Separate trouser exports were valued at about $33.5 million in 1983, almost a quarter below the 1982 total of $44.6 million. In the period 1972-1983, exports of men's and boys' separate trousers increased at a compound 4.1% annual rate.

Since 1981, total U.S. exports of apparel has fallen 40%, largely because of unfavorable exchange rates and the recession in Europe. In 1983, the value of men's and boys' sportswear exports slid 19.6% to $137.4 million.

FOREIGN TRADE

Exports

Quantity & Value of Exports of Men's & Boys' Sportswear Items, 1982, 1983

	Quantity (Thous. Dozen)			Value* (Mil. $)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Specified men's & boys' sportswear items, total	4,171.6	5,085.0	- 18.0%	$137.4	$171.0	- 19.6%
Trousers, slacks & shorts, total	1,916.2	2,064.4	- 7.2	78.1	89.1	- 12.3
Not knit, total	1,712.1	1,848.8	- 7.4	70.9	80.2	- 11.6
Trousers & slacks:						
Denim, including brushed denim, cotton	498.2	549.6	- 9.3	35.3	44.5	- 20.7
Cotton	467.0	642.7	- 27.3	15.3	17.3	- 11.6
Man-made fibers	347.8	400.6	- 13.2	9.5	10.6	- 10.4
Trousers, slacks & shorts, wool	5.3	9.9	- 46.5	0.3	0.4	- 25.0
Shorts, cotton	34.5	20.8	+ 65.9	0.9	0.6	+ 50.0
Shorts, man-made fibers	359.3	225.2	+ 59.5	9.6	6.8	+ 41.2
Knit, total	204.1	215.6	- 5.3	7.2	8.9	- 19.1
Trousers & slacks, cotton	112.3	119.1	- 5.7	3.4	5.3	- 35.8
Trousers & slacks, man-made fibers	49.9	55.0	- 9.3	2.3	2.3	--
Shorts, man-made fibers	28.9	15.2	+ 90.1	1.0	0.5	+100.0
Shorts, cotton	13.0	26.3	- 50.6	0.5	0.8	- 37.5
Shirts, total	1,622.6	2,173.8	- 25.4	34.5	48.0	- 28.1
Not knit, total	333.3	455.0	- 26.7	6.4	8.4	- 23.8
Sport, cotton	153.3	188.5	- 18.7	2.9	3.6	- 19.4
Sport, man-made fibers	129.6	212.3	- 38.9	1.4	2.0	- 30.0
Wool	1.8	4.9	- 63.3	0.2	0.3	- 33.3
Textile materials, except cotton, wool & man-made fibers	48.6	49.3	- 1.4	1.9	2.5	- 24.0
Knit	1,289.3	1,718.8	- 25.0	28.1	39.6	- 29.0
Sport, cotton	233.9	360.9	- 35.2	6.4	10.8	- 40.7
Wool	3.8	6.8	- 44.1	0.3	0.4	- 25.0
T-shirts, except all white, cotton	713.5	974.0	- 26.7	15.4	19.2	- 19.8
T-shirts, except all white, man-made fibers	185.4	171.8	+ 7.9	3.0	3.9	- 23.1
Textile materials, except cotton, wool or man-made fibers	152.7	205.3	- 25.6	3.0	5.3	- 43.4
Sweatshirts, cotton	410.1	558.5	- 26.6	17.8	22.5	- 20.9
Sport & sweatshirts, man-made fibers	198.7	238.4	- 16.6	5.9	9.2	- 35.9
Sweaters, knit, total	24.0	49.9	- 51.9	1.1	2.2	- 50.0
Wool	3.3	9.5	- 65.3	0.3	0.8	- 62.5
Cotton	8.2	17.7	- 53.7	0.3	0.5	- 40.0
Man-made fibers	12.5	22.7	- 44.9	0.5	0.9	- 44.4

* The export value is equivalent to the f.a.s. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of export.

Source: U.S. Bureau of the Census
U.S. Exports FT 410 December 1982, 1983

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

According to Census Bureau population projections, the number of American males aged 25-34 years of age will swell to 21.7 million in 1990, an 11.3% increase over 1982, before declining to 18.2 million persons by the year 2000. During the same time period, the ranks of males aged 35-44 years will continue on an upward spiral and number approximately 21.8 million men in the year 2000, up 58.0% over 1982. More than a fifth (21.5%) of the male population will fall into this age bracket at the turn of the century, making it the grouping with the largest concentration of men. Males aged 25-34 and 45-54 will each represent 18.0% of the male population by 2000.

Estimated Male Population of the U.S., 1982 & Projections to 2000*
(In Millions)

					Percent of Total Males		
	1982	1985	1990	2000	1982	1990	2000
U.S. total	112.5	116.1	121.0	129.9	100.0%	100.0%	100.0%
Under 15 years	26.3	26.5	27.9	28.6	23.4	22.8	22.0
15 years & older	86.2	89.6	93.1	101.3	76.6	77.2	78.0
15-19 years	10.1	9.4	8.6	9.6	11.7	9.2	9.5
20-24 years	10.9	10.8	9.2	8.5	12.6	9.9	8.4
25-34 years	19.5	20.9	21.7	18.2	22.6	23.3	18.0
35-44 years	13.8	15.8	18.7	21.8	16.0	20.0	21.5
45-54 years	10.8	10.9	12.3	18.2	12.5	13.2	18.0
55-64 years	10.3	10.4	9.9	11.3	11.9	10.6	11.1
65 years & older	10.8	11.5	12.6	13.7	12.5	13.5	13.5
Median age (years)	29.4	30.2	31.8	34.9			

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census
Current Population Reports
P-25 Nos. 922 & 929

Active Sports Participation

In a 1982 survey underwritten by the Miller Brewing Co. and conducted by Research & Forecasts, New York, the five most popular participatory sports for men aged 15 and over were swimming, jogging, softball/baseball, calisthenics and bicycling. In each of these activities, better than four out of 10 men in the nationally representative sample participated at least once a month (in season).

Another important spur to activewear sales is the extent to which men watch sporting events. The activewear brand worn or endorsed by a favored athlete can often lead to a purchase of the brand by the spectator. At least a fifth of the males surveyed reported that they are always or usually interested in tennis, track and field, skiing and/or gymnastics--sports where viewers can see a wide range of activewear brands and styles.

Male Participation in Specified Sports
(Percent of Men Aged 15 & Over)

	Participate Once a Month or More (In Season)
Swimming	54%
Calisthenics	46
Jogging	48
Bicycling	42
Softball/baseball	47
Bowling	25
Weightlifting	37
Basketball	34
Football/rugby	33
Tennis, racquet sports	30
Pool	32
Boating	28
Table tennis	21
Volleyball	19
Skiing	17
Golf	18
Gymnastics	5
Soccer	12
Handball	6
Wrestling	8
Horseback riding	9
Archery	8
Fencing	2
Aerobic dancing	2
Lacrosse	2
Hockey	6
Other team sports	8

Source: Miller Lite Report on American Attitudes Toward Sports 1983

Male Height/Weight Groups

The following table covers 1983 estimates on the current adult male population (18-74 years of age) in specified height/weight groups, based on an analysis of information from the U.S. Department of Health, Education and Welfare (now renamed the Department of Health and Human Services) and the U.S. Census Bureau.

Close to 2.6 million men, 3.3% of the adult male population, stand six feet two inches or taller. At the other end of the spectrum, over 10 million men, 13.6% of males, are under five feet six inches tall. Almost half (47.2%) of men between the ages of 18 and 74 fall within the five feet nine inch to six feet one inch height range.

THE POTENTIAL MARKET

Male Height/Weight Groups

Distribution of the U.S. Male Population by Height/Weight Groups, 1983
(Numbers in Thousands)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2" & Over
Total, 18-74 years	78,116	10,624	28,044	36,870	2,578
Percent	100.0%	13.6%	35.9%	47.2%	3.3%
Weight:					
Under 150 lbs.	17,576	5,312	7,187	4,921	156
Percent	22.5%	6.8%	9.2%	6.3%	0.2%
150-179 lbs.	32,652	3,906	13,826	14,530	391
Percent	41.8%	5.0%	17.7%	18.6%	0.5%
180-199 lbs.	15,389	938	4,687	9,061	703
Percent	19.7%	1.2%	6.0%	11.6%	0.9%
200-229 lbs.	9,374	391	1,952	6,249	781
Percent	12.0%	0.5%	2.5%	8.0%	1.0%
230 lbs. & over	3,125	78	391	2,109	547
Percent	4.0%	0.1%	0.5%	2.7	0.7%

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health Education & Welfare) 1979 & U.S. Bureau of Census population projections.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Active Sportswear

The active look has become the dominant influence in the men's wear field. Activewear is being used as a term to describe almost any clothing that is worn when work is over. Designs, colors and even fabrics (fleece, for example) formerly associated only with activewear have been modified by traditional sportswear makers for their own garments. The sales success of active sportswear has spawned separate main floor active sportswear departments in many department stores across the country.

In a 1982 survey conducted by Leo Shapiro & Associates, 22.5% of the men surveyed said that price was the most important factor in picking an outlet to purchase active sportswear. A fifth of the survey participants mentioned quality as the main reason for their choice of an outlet, the same percentage which named the store's selection as the primary reason for shopping for active sportswear there.

Estimated retail sales of men's active sportswear during the 1983 season (covering October 1982-September 1983 purchases) reached $1.3 billion, 5.0% higher than the previous season, based on an analysis of sales figures released by the National Sporting Goods Association. In the 1983 season, sales of men's elastic waist shorts jumped 10.1% to approximately $219 million. Sweat shirt sales climbed 11.9%, the largest percentage increase recorded in the NSGA report, to $123 million.

RETAIL SALES OF SPECIFIC TYPES OF MEN'S SPORTSWEAR

Active Sportswear

Estimated Retail Sales of Men's Active Sportswear, 1982, 1983
(Millions of Dollars)

	1983(e)	1982(e)	% Change 1983/1982
Swimwear	$ 151.8	$ 146.0	+ 4.0%
Golf clothing	160.5	153.0	+ 4.9
Parkas-down/fiber-filled	150.5	147.5	+ 2.0
Shorts-elastic waist	219.0	199.6	+ 9.7
Skiwear	122.0	116.0	+ 5.2
Sweat shirts	123.1	110.0	+ 11.9
Tennis clothing	90.6	86.5	+ 4.7
Vests-down/fiber-filled	116.8	116.6	+ 0.2
Warmup suits	178.5	175.0	+ 2.0
Total	1,312.8	1,250.2	+ 5.0

(e) = estimated.

Source: Fairchild Market Research Department based on National Sporting Goods Association The Sporting Goods Market in 1982, 1983

Men's Jeans

Jean sales throughout the 1980's are expected to be sluggish, growing only 1%-3% annually, according to a consensus of executives interviewed by Daily News Record (April 3, 1984). The primary reason for the slowed growth rate is the expected lowered numbers of men aged 15 to 24 years old, the heaviest jeans-buying group, over this time frame. (See POTENTIAL MARKETS section).

Consequently, emphasis in the future will be placed on new styles and designs, in the hopes that fancy jeans will appeal to the increasing segment of men aged 25-44 years, who grew up wearing basic five-pocket jeans and are now turning more to casual slacks. Stretch denim is also being touted by industry sources as a sales booster because it offers comfort, fit and ease of care to the older jeans wearer. It is estimated that stretch jeans may account for about 10% of all jeans sales in the near future.

A nationally-representative study of 150,000 households in the U.S., conducted by NFO Research, Inc., found that 6.4% of men's and boys' jeans sold between January and October 1983 were purchased at off-price retailers (including factory outlets).

RETAIL SALES BY STORE TYPE

The retail market for men's sportswear--particularly activewear--has grown increasingly competitive. Sporting goods stores, which have always held a major share of apparel for active sports participants, have broadened their apparel stocks to include the active looks sought by nonparticipants, while department stores and chains have become more competitive in trying to attract the sports participants.

Trade reports indicate that the men's wear market has become stratified by brand name. Sports stores opt more for the authentic brands like Adidas, Nike and Puma, while department and specialty stores make their activewear statements via collections by Jantzen, Catalina, Saratoga, Jockey and other traditional sportswear makers. Many stores are increasing their private label business in an effort to offer more fashion and unique items. Warmups, knit shirts and pull-on pants are currently the major activewear styles. In sporting goods stores, men's specialty stores and department stores, warmups in all prices, from private labels to designer labels and in a variety of fabrications continue to prove their selling power, making up as much as a third of some stores' men's wear business, according to Daily News Record (Feb. 20, 1984).

Sporting Goods & Sports Specialty Stores

Figures on the number of sporting goods stores and sports specialty stores are not currently available but should be reflected in reports to be issued by the Census Bureau on the 1982 census of retail trade.

Trade sources indicated that the trend has been for sporting goods stores to increase their emphasis on sportswear, getting into the types designed for the nonparticipant who wants to have the active look as well as activewear for the sports participant.

In the latter type, sports specialty stores, pro shops and sporting goods stores tend to dominate the market. According to an analysis of the distribution patterns of major tenniswear suppliers in the U.S., for example, sports specialty stores accounted for an average 43%, pro shops 26%, sporting goods stores 15%, department stores 14%, other outlets 2%. (SportStyle, April 11, 1983).

A 1981 analysis of the share of functional activewear sales held by type of retail outlet compiled by Celanese Corp. showed sporting goods stores accounting for 43%, pro shops 10%, specialists 14%.

Market Share of Functional Activewear, 1981

	Percent
Sporting goods stores	43%
Department stores	22
Specialists	14
Mass merchants	11
Pro shops	10

Source: Celanese Corp.

RETAIL SALES BY STORE TYPE

Sporting Goods & Sports Specialty Stores

These figures cover both men's and women's activewear. Men preferred sporting goods stores for their activewear to a greater extent than women, according to the Celanese study, particularly younger men.

Men's Wear Stores

Number of Stores & Sales of Men's Wear Stores
1980 - 1983

	1983	1982	1981	1980	% Change 1983/1982	% Change 1983/1980
Total sales (mil. $)	$8,170	$8,045	$8,152	$7,813	+ 1.6%	+ 4.6%
No. of stores*	na	na	17,163	18,106	na	na

* Includes only stores with payrolls.

Source: U.S. Bureau of the Census
Monthly Retail Sales, December 1983
County Business Patterns 1980, 1981

Men's sportswear typically accounted for 28% of sales in men's wear stores which participated in the 1982 Annual Business Survey sponsored by the Menswear Retailers of America. In these stores, the initial markup for men's sportswear was a median 52.7% in 1982, while markdowns were typically 14.8%.

Among sportswear categories, actionwear sales in 1982 were up a median 16.0% compared with the previous year. Median sales of jeans carried in men's wear stores surveyed were down 9.3% versus 1981.

Merchandising & Operating Results of Men's Sportswear Items
In Men's Wear Stores, 1982
(Median Results)

	Sales			Markdowns,	
	% Change From Last Year	% of Total Store	% Within Department	% of Sportswear Sales	Number of Stock Turns
	(72)*	(87)*	(87)*	(51)*	(44)*
Total store	+ 0.8%	100.0%	--	13.5%**	2.0
Sportswear, total	+ 0.6	22.4	100.0%	14.8	2.2
Sport shirts	- 5.5	7.1	32.6	15.5	2.6
Sweaters	+ 3.8	3.4	15.3	13.6	2.4
Actionwear	+ 16.0	1.1	5.2	17.4	2.2
Casual slacks	+ 7.0	3.4	17.4	12.6	2.3
Jeans	- 9.3	3.6	14.2	14.0	2.1
Jackets & heavy outerwear	- 0.6	3.7	15.7	17.5	2.0
Coordinated leisurewear	- 27.4	0.8	3.1	21.1	2.1

*Number in parenthesis refers to the number of reporting firms in each category.
**Markdowns as a percent of total store sales.

Source: Menswear Retailers of America
1982 Annual Business Survey

RETAIL SALES BY STORE TYPE

Men's Wear Stores

The typical men's wear store in the MRA survey sold $101.90 worth of goods per square foot of total store area in 1982. Net profit before taxes for this typical retailer was 2.7% of 1982 sales. Total expenses consumed 40.3% of sales that same year.

Ratios of Financial Performance for Men's Wear Stores
By Sales Size of Store, 1982
(Median Results)

	Men's Wear Stores With 1982 Sales of:				
	Under $300,000 (35)*	$300,000-499,999 (40)*	$500,000-999,999 (57)*	$1 Million-3,499,999 (40)*	$3,500,000 & Over (25)*
Current assets to current liabilities	4.2	3.7	3.7	2.9	2.4
Quick ratios**(times)	0.9	1.0	1.5	1.3	0.9
Net profits on net sales (percent)	1.1%	3.9%	2.7%	3.1%	2.9%
Net profits on net worth (percent)	5.1	12.7	8.2	10.1	11.1
Net profits on net working capital	5.7	15.7	6.3	11.1	11.7
Net sales to net worth (times)	3.1	3.7	3.4	3.5	5.6
Total liabilities on net worth	53.1%	57.3%	42.6%	72.8%	94.0%

* Number in parenthesis refers to the number of reporting firms in each category.
**The quick ratio eliminates inventory and prepaid items from current assets and is obtained by dividing the quick assets by current liabilities.

Source: Menswear Retailers of America
1982 Annual Business Survey

Department Stores

Department store sales of active sportswear in 1982 gained a median 10.1% compared with 1981, well above the median rise for the entire store (excluding budget departments) of 3.8%. Casual wear jacket and slack sales increased 8.7% in the typical department store reporting to the National Retail Merchants Association.

While overall sales per square foot of selling space reached a typical $109.00 for these department stores in 1982, sales per square foot in the men's active sportswear department were a much higher $207.60. Stock turnover rates in men's sportswear categories averaged higher than the overall figure for adult male apparel, particularly in sweaters.

RETAIL SALES BY STORE TYPE

Department Stores

Merchandising & Operating Results of Men's Sportswear Departments In Department Stores With Sales Over $1 Million

(Median Results)

	Adult Male Apparel (97)*	Casual Wear-Jackets & Slacks (46)*	Sport Shirts (31)*	Sweaters & Vests (24)*	Active Sportswear (43)*
Net sales, % change from last year	+ 6.5%	+ 8.7%	+ 0.4%	+ 6.6%	+ 10.1%
Sales, % to total store	12.8	3.1	1.5	0.9	0.7
Net sales, % of adult male apparel	100.0	21.8	11.9	7.0	5.4
$ sales per sq. ft. of selling space (main or largest unit)	$184.7	$126.1	$152.0	na	$207.6
Cumulative markon, %	50.5	49.8	51.3	52.0	50.7
Gross margin, % of net sales (incl. cash discounts)	43.2	41.0	45.6	46.1	44.7
Markdowns, retail, % of sales	14.1	16.4	15.1	15.2	13.7
Number of stock turns (times)	2.7	2.9	3.8	4.2	3.1
Sales promotion, % of net sales	3.0	3.7	4.8	na	3.3

*Number in parenthesis refers to the number of reporting companies.

Source: National Retail Merchants Association
Merchandising & Operating Results of 1982
1983 edition

ADVERTISING

Percent of 1982 Newspaper Ad Linage Done By Retailers Each Month

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Slacks & jeans	3.5%	6.6%	6.3%	7.9%	8.1%	11.8%	5.5%	13.4%	8.1%	8.9%	9.0%	10.9%	100.0%
Sportswear & accessories	5.1	5.1	6.2	6.3	7.2	13.9	5.4	8.6	6.2	9.0	11.8	15.2	100.0

Source: The Advertising Checking Bureau
Neustadt Reports Div. based on newspaper
advertising in Chicago, Philadelphia,
Cincinnati, Cleveland, Dallas, Los Angeles
and Washington, D.C.

CONSUMER PRICE TRENDS

Retail prices for men's coats and outer jackets in February 1984 remained unchanged from the same month a year ago, according to the Bureau of Labor Statistics, and declined a steep 3.5% compared with the January 1984 CPI. Over the 12 month period ended February 1984, men's shirt prices stayed the same while dungarees, jeans and trousers rose 0.6% at retail. Compared with January 1984 prices, men's shirts increased 3.0% in February; dungarees, jeans and trouser prices were up 1.4%.

Consumer Price Index of Specified Men's Sportswear Items
(December 1977=100 unless otherwise specified)

	Annual Averages			% Change
	1983(p)	1982	1981	1983/1982
All items (1967=100)	298.9	289.1	272.4	+ 3.4%
Apparel commodities less footwear (1967=100)	181.0	177.0	174.0	+ 2.3
Men's apparel	119.0	116.0	111.7	+ 2.6
Coats & jackets	101.5	100.0	98.7	+ 1.5
Shirts	123.6	122.4	118.7	+ 1.0
Dungarees, jeans & trousers	112.5	110.3	106.3	+ 2.0

(p) = preliminary.

Source: U.S. Bureau of Labor Statistics.

CONSUMER BUYING HABITS

In a September 1983 survey undertaken by R.H. Bruskin Associates for Daily News Record (September 29, 1983), a fifth of the nationally representative sample of 500 men said that, in the 12 months following the survey, purchases of active sportswear items will increase in relation to the amount spent on activewear in the year prior to the survey. Almost a third (32.6%) of the men and women aged 18-34 years intend to raise their level of spending on active sportswear over this period.

Intention To Purchase Active Sportswear Compared With Previous 12 Months

	Intend to Purchase:						
	Much More	Somewhat More	About the Same	Somewhat Less	Much Less	None	Don't Know
Total	8.2%	13.6%	52.4%	9.1%	11.4%	4.2%	1.1%
By Sex							
Male	7.6	14.9	56.7	7.0	8.2	4.1	1.5
Female	8.8	12.3	48.5	11.1	14.2	4.3	0.8
By Age							
18-24 years	15.6	16.5	48.7	8.6	9.6	1.0	--
25-34 years	11.5	21.7	46.3	10.8	8.3	1.0	0.5
35-49 years	5.7	15.9	60.0	7.1	8.4	1.9	1.0
50-64 years	4.1	7.3	61.2	7.7	15.2	3.3	1.3
65 years & older	3.5	4.6	45.7	10.9	14.8	17.4	3.1

(continued)

Intention to Purchase Active Sportswear Compared With Previous 12 Months
(Continued)

	Intend to Purchase:						
	Much More	Somewhat More	About the Same	Somewhat Less	Much Less	None	Don't Know
By Income							
Under $15,000	8.1%	6.3%	47.1%	11.8%	16.6%	8.4%	1.7%
$15,000-19,999	9.9	10.7	50.4	10.0	12.8	6.3	--
$20,000-29,999	10.0	19.2	53.9	7.5	7.6	1.1	0.6
$30,000-39,999	6.3	14.1	61.8	7.6	9.4	0.7	--
$40,000 & over	4.9	26.0	59.2	4.1	2.6	2.5	0.8
By Region							
Northeast	8.4	15.7	46.7	8.6	13.4	6.0	1.1
North Central	4.3	13.7	55.0	11.2	10.9	4.1	0.9
South	11.0	11.9	54.4	8.6	10.7	2.2	1.2
West	8.5	13.9	52.0	7.8	10.7	5.6	1.5

The following information on purchase of men's sportswear for men aged 17 and older for the years 1983 and 1982 has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. The information is based on findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families.

CONSUMER BUYING HABITS

Slacks

Purchases of men's corduroy slacks fell 5.2% in dollars and 6.0% in units between 1982 and 1983, according to NPD panel members. Non-corduroy slack purchases were off 2.9% in dollars and 1.7% in quantity during the same period.

Purchases of Men's Slacks by Store Type, 1982, 1983

	Corduroy Slacks				Non-corduroy Slacks			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	28.7	22.3	35.5	27.8	34.4	36.3	36.7	38.1
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	27.0	32.5	23.6	26.9	25.5	20.6	22.1	18.1
Discount stores	15.1	12.4	11.8	9.4	12.4	12.4	9.8	10.0
Specialty stores	16.8	23.1	17.8	26.5	17.1	21.2	22.5	26.1
All other outlets	11.3	8.2	10.2	8.0	9.8	8.4	8.2	6.7
No answer	1.1	1.5	1.0	1.4	0.8	1.0	0.8	1.0

Purchases of Men's Slacks by Price Points, 1982, 1983

	Corduroy Slacks				Non-corduroy Slacks			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $14.00	39.0	41.7	24.3	25.6	31.7	34.8	17.2	17.5
$14.00 - $19.99	32.8	39.7	31.5	42.8	36.1	34.4	33.5	33.5
$20.00 & over	28.1	18.6	44.2	31.6	32.2	30.8	49.3	49.0

Purchases of Men's Slacks by Fiber, 1982, 1983

	Percent of Units		Percent of Dollars	
	1983	1982	1983	1982
Corduroy Slacks				
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	75.3	75.4	75.7	73.4
100% cotton	14.9	17.2	15.3	19.9
All other fibers	3.8	2.9	3.6	2.3
No answer	6.0	4.5	5.4	4.4
Non-corduroy Slacks				
Total	100.0	100.0	100.0	100.0
100% polyester	38.0	42.3	34.9	40.0
Polyester/cotton	34.1	32.2	30.7	28.0
Other polyester blends	14.0	11.4	15.8	13.5
100% cotton & cotton blends	4.3	4.7	4.0	4.2
All other fibers	4.0	3.6	7.8	7.3
No answer	5.6	5.8	6.8	7.0

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

Jeans

Among NPD member households, denim jean purchases declined 2.6% in terms of dollars and 2.4% in units. Dollar sales of men's corduroy jeans in 1983 dropped 19.4% from 1982 on a 14.3% reduction in unit sales. Other types of men's jeans were off 9.3% in dollars, with unit sales down 14.3%.

Purchases of Men's Jeans by Store Type, 1982, 1983

	Denim Jeans		Corduroy Jeans		Other Men's Jeans	
	1983	1982	1983	1982	1983	1982
			Percent of Units			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	21.7	22.0	20.3	26.2	24.1	21.8
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	30.5	27.5	25.8	27.7	29.6	34.7
Discount stores	16.5	17.1	15.8	10.4	15.9	11.7
Specialty stores	17.2	20.7	27.4	26.9	18.6	16.7
All other outlets	12.2	11.0	10.1	8.0	11.0	12.1
No answer	1.8	1.6	0.6	0.8	0.6	3.0
			Percent of Dollars			
Total	100.0	100.0	100.0	100.0	100.0	100.0
Department stores	23.8	25.2	21.1	29.3	25.6	23.0
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	28.2	24.5	25.2	24.1	29.2	31.7
Discount stores	14.7	14.8	14.2	9.8	13.0	9.2
Specialty stores	19.9	23.8	28.3	28.1	20.6	23.2
All other outlets	11.5	10.0	10.5	7.9	11.1	9.6
No answer	2.0	1.6	0.7	0.8	0.4	3.2

Purchases of Men's Jeans by Price Points, 1982, 1983

	Denim Jeans		Corduroy Jeans		Other Men's Jeans	
	1983	1982	1983	1982	1983	1982
			Percent of Units			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $14.00	48.1	50.4	52.1	44.2	39.6	47.7
$14.00 - $19.99	41.1	37.3	41.5	45.7	37.2	35.0
$ 20.00 & over	10.8	12.3	6.4	10.1	23.2	17.3
			Percent of Dollars			
Total	100.0	100.0	100.0	100.0	100.0	100.0
Less than $14.00	34.9	35.3	37.9	31.6	25.7	30.4
$14.00 - $19.99	46.6	42.8	50.7	51.9	38.8	39.4
$20.00 & over	18.5	21.8	11.3	16.5	35.5	30.2

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Jeans

Purchases of Men's Jeans by Months, 1982, 1983

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
% of Units:													
Denim jeans													
1983	5.6%	5.5%	7.7%	6.6%	6.2%	8.7%	7.1%	9.9%	6.8%	9.4%	11.2%	15.3%	100.0%
1982	5.0	5.4	7.7	7.4	6.0	7.2	8.3	13.6	6.9	6.2	11.4	15.0	100.0
Corduroy jeans													
1983	6.0	6.7	1.9	3.4	1.1	2.5	2.0	10.2	8.0	12.5	15.0	30.6	100.0
1982	6.8	8.7	4.3	2.8	0.7	2.4	5.0	11.8	13.3	13.4	12.4	20.4	100.0
Other jeans													
1983	7.8	4.4	9.3	9.5	8.3	9.8	8.1	8.7	7.0	4.8	7.2	15.1	100.0
1982	5.6	5.7	8.7	12.8	8.8	16.1	5.6	5.7	6.5	7.2	8.9	8.3	100.0
% of Dollars:													
Denim jeans													
1983	5.5	5.3	7.8	6.6	6.4	8.7	7.3	9.5	6.6	9.2	10.7	16.4	100.0
1982	4.9	5.0	7.7	7.6	6.2	8.1	7.8	12.0	7.1	6.4	11.3	15.9	100.0
Corduroy													
1983	5.7	4.6	1.4	4.2	1.3	2.9	1.8	9.0	4.9	11.7	16.0	36.3	100.0
1982	5.9	6.9	4.2	2.6	0.5	2.8	5.0	12.3	10.2	13.4	14.2	21.9	100.0
Other jeans													
1983	7.4	4.6	10.5	8.6	7.8	10.7	8.2	8.6	6.3	5.9	7.3	14.1	100.0
1982	5.1	5.7	9.0	15.5	7.8	15.3	5.5	6.2	6.4	6.7	8.0	8.7	100.0

Purchases of Men's Jeans by Fibers, 1982, 1983

	Denim Jeans				Corduroy Jeans			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	21.2	29.0	22.0	26.7	73.7	76.4	72.3	77.5
100% cotton	73.3	61.6	72.0	62.9	17.0	14.4	17.9	15.5
All other fibers	1.7	4.5	1.8	5.8	5.2	5.5	4.8	4.2
No answer	3.8	4.8	4.1	4.7	4.1	3.7	5.0	2.8

	Other Men's Jeans			
	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	7.4	12.3	9.2	12.8
Polyester/cotton blend	45.6	52.1	45.0	50.0
100% cotton	38.8	26.6	36.0	28.9
All other fibers	2.1	5.8	2.9	4.8
No answer	6.2	3.1	6.8	3.5

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

Active Sportswear - Swimwear

As reported by NPD, men's swimwear sales in 1983 dipped 7.1% in dollars and 8.7% in the quantity purchased compared with 1982.

Purchases of Men's Swimwear by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	30.7	24.7	36.3	30.5
Mass merchandisers (Sears/Penneys/Wards/K-mart)	25.3	30.3	23.3	28.7
Discount stores	17.9	16.0	13.6	10.2
Specialty stores	10.6	15.0	12.2	17.6
All other outlets	15.1	11.9	14.2	11.3
No answer	0.4	2.0	0.4	1.7

Purchases of Men's Swimwear by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $7.00	26.9	41.8	13.3	22.4
$7.00 - $10.99	42.2	24.1	38.9	20.4
$11.00 & over	30.9	34.2	47.8	55.2

Purchases of Men's Swimwear by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	69.7	67.2	71.9	68.2
100% polyester & other polyester	6.4	3.1	6.2	3.7
100% nylon and nylon blends	11.9	14.7	11.4	14.7
100% cotton & cotton blends	5.7	6.6	4.6	5.6
All other fibers	2.2	1.1	2.1	2.0
No answer	4.1	7.3	3.7	5.8

Purchases of Men's Swimwear by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	3.4%	3.7%	4.4%	5.5%	17.2%	27.2%	19.5%	12.8%	2.8%	1.8%	1.3%	0.4%	100.0%
1982	1.8	4.0	7.4	6.2	14.6	27.5	25.9	5.8	3.9	0.3	0.4	2.1	100.0
Dollars:													
1983	3.3	5.8	4.3	5.5	16.3	28.2	16.3	14.2	2.7	1.3	1.9	0.1	100.0
1982	2.5	5.9	6.1	6.8	17.6	31.8	18.2	6.5	2.2	0.4	0.02	1.8	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Sweatshirts

NPD member households reported purchasing 25.7% more sweatshirts in 1983 than the prior year. These sweatshirts had a total retail value 32% higher than in 1982.

Purchases of Men's Sweatshirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	16.5	14.7	19.5	15.1
Mass merchandisers (Sears/Penneys/Wards/K-mart)	32.5	41.1	31.6	41.7
Discount stores	26.7	20.3	22.1	18.3
Specialty stores	9.3	11.1	12.1	12.7
All other outlets	14.6	10.8	14.4	10.7
No answer	0.4	2.0	0.4	1.4

Purchases of Men's Sweatshirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $7.00	35.6	40.6	18.2	21.3
$7.00 - $10.99	34.9	32.8	33.3	32.6
$11.00 & over	29.6	26.6	48.4	46.1

Purchases of Men's Sweatshirts by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester & polyester blends	30.0	35.9	34.9	40.1
100% acrylic	10.3	12.5	9.8	13.5
Acrylic blends	46.0	34.0	41.3	29.4
100% cotton & cotton blends	8.2	11.3	8.0	9.7
All other fibers	1.8	3.0	3.0	3.5
No answer	3.6	3.2	2.9	3.8

Purchases of Men's Sweatshirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	7.8%	5.3%	4.8%	4.6%	2.8%	2.1%	2.5%	4.0%	5.6%	11.2%	18.6%	30.7%	100.0%
1982	6.4	8.0	6.6	3.5	2.8	3.0	4.4	4.3	4.7	10.2	17.1	29.0	100.0
Dollars:													
1983	6.3	3.9	4.7	3.4	2.6	2.3	2.0	3.8	5.1	11.6	19.6	34.7	100.0
1982	6.1	5.3	5.3	2.6	2.8	2.5	3.7	3.8	4.8	8.6	19.2	35.2	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Polo Shirts

Purchases of men's polo shirts by NPD panelists in 1983 exceeded 1982 in dollars spent by 5.6% but the number purchased remained virtually unchanged.

Purchases of Men's Polo Shirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	26.3	23.5	32.7	30.1
Mass merchandisers (Sears/Penneys/Wards/K-mart)	29.5	31.5	26.0	28.2
Discount stores	17.0	18.9	13.2	13.7
Specialty stores	13.0	14.3	15.2	17.3
All other outlets	12.9	11.0	11.7	9.8
No answer	1.2	0.7	1.1	0.8

Purchases of Men's Polo Shirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $8.00	45.0	49.3	22.2	26.6
$8.00-$15.99	40.0	38.5	46.5	46.3
$16.00 & over	15.0	12.2	31.2	27.1

Purchases of Men's Polo Shirts by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	68.9	62.5	65.6	61.0
100% cotton	17.3	13.3	20.0	15.9
100% polyester	4.7	11.2	4.7	10.4
100% acrylic & acrylic blends	3.4	4.3	4.3	4.7
All other fibers	2.3	5.1	2.1	4.4
No answer	3.3	3.5	3.6	3.6

Purchases of Men's Polo Shirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	3.5%	4.2%	7.1%	5.6%	10.2%	17.0%	13.4%	10.3%	4.7%	4.0%	7.3%	12.8%	100.0%
1982	4.8	5.0	7.1	7.5	11.6	14.5	11.3	10.8	5.8	4.1	6.9	10.5	100.0
Dollars:													
1983	3.2	3.3	7.6	5.9	9.7	15.9	10.3	9.3	4.8	4.3	8.3	17.2	100.0
1982	4.7	4.2	6.7	7.6	10.7	14.5	10.0	10.0	6.1	4.3	8.1	13.1	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Sweatshirts, Joggers & Jumpsuits

NPD panel purchases in this activewear category were off 21.0% in 1983 compared with the previous year, but the amount spent on sweatpants, joggers and jumpsuits declined by 1.5% over the same period.

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	11.1	20.1	9.3	26.2
Mass merchandisers (Sears/Penneys/Wards/K-mart)	53.9	36.9	39.9	36.4
Discount stores	9.0	35.6	5.3	26.6
Specialty stores	20.8	4.2	42.6	5.6
All other outlets	5.3	3.2	2.8	5.3

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $14.00	16.0	34.3	5.0	14.2
$14.00 - $19.99	39.8	28.6	27.8	25.2
$20.00 & over	44.1	37.0	67.2	60.6

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Fibers, 1982

	1982	
	Units	Dollars
Total	100.0%	100.0%
Polyester/cotton blend	74.9	71.0
100% polyester & other polyester blends	9.8	11.8
100% cotton	15.2	17.3

NOTE: 1983 data by fiber not shown due to a significant percentage of non-responses.

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Shorts

In dollars, men's short sales slid 12.5% in 1983, in quantity, sales were 9.5% under the 1982 level, according to NPD.

Purchases of Men's Shorts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	25.2	24.2	29.6	29.5
Mass merchandisers (Sears/Penneys/Wards/K-mart)	29.1	32.5	26.3	28.8
Discount stores	20.8	18.6	15.4	13.2
Specialty stores	10.6	10.8	14.0	13.9
All other outlets	13.6	13.1	13.8	13.4
No answer	0.7	0.9	0.9	1.2

Purchases of Men's Shorts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $6.00	31.6	33.7	13.8	14.6
$6.00 - $11.99	46.1	45.4	46.0	46.7
$12.00 & over	22.3	20.9	40.1	38.7

Purchases of Men's Shorts by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	6.7	8.1	5.2	7.8
Polyester/cotton blend	68.7	67.7	69.1	67.5
100% cotton	11.1	13.5	13.6	12.7
100% nylon & nylon blends	2.5	1.9	2.5	2.1
100% acrylic & acrylic blends	5.6	3.6	3.5	3.4
All other fibers	1.7	1.4	1.7	1.4
No answer	3.8	3.8	4.4	5.0

Purchases of Men's Shorts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	1.7%	3.1%	6.2%	8.0%	14.6%	27.9%	18.0%	9.8%	4.1%	1.9%	2.2%	2.6%	100.0%
1982	2.2	4.2	6.0	7.5	16.4	20.6	20.4	11.2	3.7	1.6	1.9	4.0	100.0
Dollars:													
1983	1.1	2.9	6.8	8.2	14.9	29.6	16.9	8.9	3.8	2.1	1.7	3.1	100.0
1982	1.8	3.3	6.7	8.4	15.7	22.9	20.1	11.1	2.6	1.9	1.9	3.6	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Sport Shirts

Men's sport shirt sales made by NPD panelists in 1983 were below the previous year in dollars, spent by 3.5% and 5.3% in quantity purchased.

Purchases of Men's Sport Shirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	23.8	26.6	28.4	31.1
Mass merchandisers (Sears/Penneys/Wards/K-mart)	34.3	35.4	30.1	29.5
Discount stores	19.8	16.4	14.9	13.3
Specialty stores	12.7	12.3	16.5	16.5
All other outlets	8.7	8.5	9.2	8.9
No answer	0.7	0.8	0.9	0.7

Purchases of Men's Sport Shirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $8.00	43.1	45.3	22.5	23.9
$8.00 - $15.99	42.1	40.5	47.2	46.9
$16.00 & over	14.8	14.1	30.3	29.2

Purchases of Men's Sport Shirts by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blends	58.5	55.0	58.3	54.1
100% cotton	26.0	26.8	24.8	25.3
100% acrylic & acrylic blends	3.1	3.4	3.4	3.5
100% polyester	4.2	5.8	3.4	5.2
All other fibers	5.1	6.0	7.0	8.4
No answer	3.1	3.0	3.1	3.5

Purchases of Men's Sport Shirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	6.4%	4.9%	5.6%	5.8%	5.5%	10.4%	7.0%	6.2%	5.7%	8.1%	13.8%	20.6%	100.0%
1982	6.6	5.2	4.7	5.5	5.1	7.8	7.3	6.2	6.4	8.8	14.8	21.7	100.0
Dollars:													
1983	5.4	4.6	5.0	6.0	5.7	9.7	6.2	6.3	5.3	8.6	13.7	23.5	100.0
1982	6.3	4.6	4.3	5.5	5.5	7.5	6.3	5.9	5.5	8.5	15.4	24.5	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Sweaters

Dollar sales of men's sweaters fell 8.9% in 1983 compared with 1982 as the number of sweaters purchased by households included in the NPD survey dropped 2.5%.

Purchases of Men's Sweaters by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	33.4	36.5	37.0	40.0
Mass merchandisers (Sears/Penneys/Wards/K-mart)	21.5	21.7	18.0	17.8
Discount stores	16.6	15.1	12.1	10.8
Specialty stores	17.3	17.1	22.4	21.8
All other outlets	9.9	8.4	9.2	8.1
No answer	1.3	1.3	1.3	1.6

Purchases of Men's Sweaters by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $12.00	34.5	36.6	16.8	18.8
$12.00 - $19.99	38.4	39.9	36.1	39.9
$20.00 & over	27.1	23.5	47.1	41.4

Purchases of Men's Sweaters by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester & polyester blends	6.5	8.5	6.0	7.5
100% cotton & cotton blends	3.7	2.3	4.3	1.9
100% wool & wool blends	24.5	20.1	30.9	27.4
100% acrylic	47.8	53.6	40.2	48.2
Acrylic blends	9.8	7.1	9.1	6.2
All other fibers	1.7	2.6	3.4	2.6
No answer	6.0	5.7	6.1	6.2

Purchases of Men's Sweaters by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	8.9%	6.0%	3.6%	1.9%	1.0%	1.1%	1.0%	3.4%	4.6%	9.7%	19.8%	39.0%	100.0%
1982	6.9	6.8	3.0	1.5	0.5	1.7	1.8	3.4	4.5	9.7	23.0	37.1	100.0
Dollars													
1983	7.2	4.4	3.0	1.1	1.2	1.1	1.0	2.9	4.9	10.0	19.7	43.3	100.0
1982	6.9	5.7	1.9	1.9	0.2	1.1	1.3	3.3	3.9	9.6	23.1	40.9	100.0

Source: NPD Special Industry Services.

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INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

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Footwear
(Men's, Women's, Boys' and Girls')

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FOOTWEAR (MEN'S, WOMEN'S, BOYS' & GIRLS')

Market Trends

While the domestic footwear industry appears to be losing the battle against imports, consumption of footwear by U.S. consumers has continued to rise at a strong pace. According to the U.S. Bureau of Industrial Economics, per capita purchases in 1983 increased for the second consecutive year, reaching 3.7 pairs, up from a low of 3.22 pairs in 1981.

Personal consumption expenditures for footwear in 1983 were valued at $21.6 billion, up 6.3% over the 1982 total. Retail prices, on the other hand, leveled off, with the Consumer Price Index for footwear averaging a gain of less than 1% compared with 1982.

Large manufacturers have been able to improve their profitability by diversifying into general and specialty retailing, and importing footwear, sourcing on a global scale. Major efforts have also been made to improve productivity and lower labor costs within domestic plants.

Nevertheless, the long-term prospects for the U.S. manufacturer remain poor. The U.S. Bureau of Industrial Economics projects a compound annual rate of decline of about 2%, in constant dollars, to 1988. Although per capita consumption will reach higher levels as the economy prospers, the growth will be filled by imports. Government action to stem the tide appears unlikely.

While the application of new technology, especially robotics, can be utilized by large, well-capitalized companies to narrow differences in labor costs between the U.S. and foreign producers, this technology will also be adopted by overseas competitors. Further consolidation and concentration of manufacturing companies in the U.S. footwear industry seems inevitable.

The fast growth in the market for athletic footwear has leveled off, and consumers have turned their attention to an increasing extent to "athleisure" footwear--footwear with an active look plus fashion features--also known as "street active." This type of footwear is becoming a major product of athletic footwear producers as well as some activewear manufacturers.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The U.S. Bureau of the Census compiles a complete census of U.S. manufactures every five years, 1977 being the latest data currently available. (Preliminary findings from the 1982 census should be released later this year). Between censuses the bureau conducts annual surveys among a representative sample of manufacturers which are the basis for estimates on key measures of manufacturing activity for industry groups. These estimates provide a continuous series of basis industry statistics, now available through 1981.

In addition, the Bureau of Industrial Economics (Department of Commerce) publishes an annual edition of U.S. Industrial Outlook. This includes estimates on footwear industry trends, updating Census Bureau data. Information from this source will be found following the next table which is based on Census Bureau reports.

GENERAL INDUSTRY STATISTICS

The U.S. Manufacturing Industry by Type of Footwear, 1977, 1980, 1981

	1981	1980	1977	% Change 1981/1980
NONRUBBER FOOTWEAR, TOTAL (SIC 314)				
Number of companies	na	na	541	--
Number of establishments#	700	710	811	--
With 20 or more employees#	547	562	603	--
Payroll (mil. $)	$1,314.9	$1,203.7	$1,031.5	+ 9.2%
Value added by manufacture (mil. $)**	2,987.5	2,745.3	2,069.4	+ 8.8
Value of industry shipments (mil. $)***	5,496.3	5,106.9	3,891.7	+ 7.6
Capital expenditures, new (mil. $)	104.1	67.9	37.1	+ 53.3
MEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3143*)				
Number of companies	na	na	115	--
Number of establishments#	na	207	213	--
With 20 or more employees#	na	176	180	--
Payroll (mil. $)	$ 518.1	$ 441.6	$ 417.0	+ 17.3%
Value added by manufacturer (mil. $)**	1,280.3	1,084.7	871.9	+ 18.0
Value of industry shipments (mil. $)***	2,458.5	2,149.0	1,734.5	+ 14.4
Capital expenditures, new (mil. $)	47.4	22.9	14.5	+107.0
WOMEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3144*)				
Number of companies	na	na	243	--
Number of establishments#	na	248	328	--
With 20 or more employees#	na	214	241	--
Payroll (mil. $)	$ 494.7	$ 453.4	$ 388.6	+ 9.1%
Value added by manufacturer (mil. $)**	1,086.8	955.1	755.0	+ 13.8
Value of industry shipments (mil. $)***	1,913.8	1,733.5	1,361.2	+ 10.4
Capital expenditures, new (mil. $)	29.4	20.0	9.7	+ 47.0
HOUSE SLIPPERS (SIC 3142*)				
Number of companies	na	na	65	--
Number of establishments#	na	68	78	--
With 20 or more employees#	na	48	55	--
All employees (thous.)	8.8	9.2	8.1	- 4.3%
Production workers (thous.)	7.5	7.7	7.0	- 2.6
Payroll (mil. $)	$ 75.9	$ 74.0	$ 54.5	+ 2.6
Value added by manufacture (mil. $)**	149.4	190.9	108.8	- 21.7
Value of industry shipments (mil. $)***	268.2	323.1	201.2	- 17.0
Capital expenditures, new (mil. $)	3.5	2.3	2.3	+ 52.2

(continued)

GENERAL INDUSTRY STATISTICS

The U.S. Manufacturing Industry by Type of Footwear, 1977, 1980, 1981
(continued)

	1981	1980	1977	% Change 1981/1980
FOOTWEAR, EXCEPT RUBBER, NOT ELSEWHERE CLASSIFIED (SIC 3149*)				
Number of companies	na	na	159	--
Number of establishments#	na	164	192	--
With 20 or more employees	na	119	127	--
All employees (thous.)	23.4	26.6	24.8	- 12.0%
Production workers (thous.)	20.4	23.3	21.8	- 12.4
Payroll (mil. $)	$ 226.2	$ 234.7	$171.4	- 3.6
Value added by manufacture (mil. $)**	471.1	514.7	333.4	- 8.5
Value of industry shipments (mil. $)***	855.7	901.3	594.8	- 5.1
Capital expenditures, new (mil. $)	23.8	21.3	10.6	+ 11.7
RUBBER & PLASTICS FOOTWEAR (SIC 302*)				
Number of companies	na	na	67	--
Number of establishments#	na	68	84	--
With 20 or more employees	na	44	50	--
Payroll (mil. $)	$ 147.3	$ 174.3	$ 159.1	- 15.4%
Value added by manufacture (mil. $)**	360.1	307.7	272.3	+ 17.0
Value of industry shipments (mil. $)***	707.3	590.8	517.0	+ 19.7
Capital expenditures, new (mil. $)	14.9	12.5	11.3	+ 19.2
BOOT & SHOE CUT STOCK & FINDINGS (SIC 3131*)				
Number of companies	na	na	174	--
Number of establishments#	na	175	190	--
With 20 or more employees	na	96	96	--
All employees (thous.)	9.8	10.0	8.5	- 2.0%
Production workers (thous.)	8.4	8.7	7.4	- 3.4
Payroll (mil. $)	$ 105.5	$ 93.1	$ 65.3	+ 13.3
Value added by manufacture (mil. $)**	219.6	196.3	109.4	+ 11.9
Value of industry shipments (mil. $)***	488.4	431.5	270.6	+ 13.2
Capital expenditures, new (mil. $)	8.4	6.3	3.0	+ 33.3

na = not available

# Each business location is counted as a separate establishment. Figures for 1980 and 1981 are from the U.S. Bureau of the Census, County Business Patterns.

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) System determined by the principal product manufactured, as shown below. (SIC 314 is a composite of industries in 3142, 3143, 3144)

SIC 3143 comprises establishments primarily engaged in the production of men's dress and casual shoes, boots and work shoes. Footwear produced in this industry is primarily of leather.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

(Footnotes continued)

SIC 3144 comprises establishments primarily engaged in the production of women's dress and casual shoes, sandals and boots. Footwear produced in this industry is primarily of leather.

SIC 3142 comprises establishments primarily engaged in the production of house slippers of leather or other materials. Slipper socks are included in this industry.

SIC 3149 comprises establishments primarily producing footwear not classified in the above industries or in SIC 3021 (rubber and plastic). Included in SIC 3149 are shoes for infants and babies, children, misses, youths and boys. Also included are all athletic shoes, theatrical shoes, and beach slippers.

SIC 302 comprises establishments primarily engaged in manufacturing all-rubber and plastics footwear, waterproof fabric-upper footwear having rubber or plastic soles vulcanized to the uppers. There are two segments in this industry, (1) protective footwear, such as hunting boots, galoshes and overshoes; and (2) rubber-soled fabric upper footwear, such as athletic footwear, sneakers, sport oxfords and specialties designed for leisure wear.

SIC 3131 comprises establishments primarily engaged in manufacturing leather soles, inner soles, and other boot and shoe cut stock findings. This industry also includes finished wood heels. It does not include manufacturers of shoe findings made of rubber, plastic, or fiber.

**Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, contract work, etc., from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

***Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products, as well as miscellaneous receipts for contract work, resales, etc. This value should be clearly distinguished from the total value of footwear made by all producers, including those who make footwear as a seconary product and who are classified in other industries. This total product value is shown in the tables on pages 22 and 23.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977;
Annual Surveys of Manufactures; 1980, 1981.

GENERAL INDUSTRY STATISTICS

Explanation of other terms used in this Fact File:

> Nonrubber footwear: Includes shoes, boots and slippers made by "conventional" processes, such as cemented, welt, slip-lasted, etc., and shoes with rubber sole vulcanized to leather uppers. (Footwear covered in SIC 314)
>
> Rubber/plastic footwear: Footwear with rubber or plastic soles/fabric uppers and rubber or plastic protective footwear. (SIC 302)

The U.S. Bureau of Industrial Economics has estimated that there were some 300 U.S. companies producing nonrubber footwear as of 1982, operating 594 plants at the start of the year. During 1982, 10 factories started operations anew or under new management and 33 closed, lowering the net total to 571 by the end of the year. The number of factories in the nonrubber industry has steadily declined from a high of 990 in 1965. Plants producing rubber/plastics footwear numbered about 50 in 1982, according to the Bureau.

Estimated data for 1983 and projections for 1984 on a constant (1972) dollar basis were reported as follows:

Footwear Industry Trends & Projections, 1972-1983
(Millions of Dollars)

	1983	Compound Annual Growth Rate 1972-1983	Forecast 1984	% Change 1984/1983
Nonrubber footwear				
Industry shipments (current $)	$ 4,908	3.8	--	--
Industry shipments (1972 $)	2,345	- 3.0	$ 2,311	- 1.4%
Rubber/plastics footwear				
Industry shipments (current $)	705	1.5	--	--
Industry shipments (1972 $)	420	- 3.2	420	-0-

Source: U.S. Bureau of Industrial Economics, 1984 U.S. Industrial Outlook

Based on its annual Survey of Industrial & Commercial Buying Power, Sales & Marketing Management Magazine has compiled estimates on the number of establishments and value of industry shipments for major U.S. industries, including footwear, for the year 1983.

GENERAL INDUSTRY STATISTICS

Selected Footwear Industry Estimates, 1983

Industry Segments	Establishments		Employment	Shipments	
	Total*	Large**		Mil. $*	% In Large Estabs.**
Nonrubber					
Boot & shoe cut stock & findings	147	38	12,131	391.0	58%
House slippers	52	26	8,467	218.4	84
Men's footwear except athletic	178	142	56,200	2,063.8	97
Women's footwear except athletic	173	132	43,242	1,604.6	95
Other nonrubber footwear	189	126	42,697	711.5	92
Rubber/Plastic					
Rubber/plastic footwear (SIC 3021)	36	27	13,120	664.0	97

* Covers establishments with 20 or more employees.
**"Large" establishments are defined as those with 100 or more employees.

Source: Sales & Marketing Management
(April 23, 1984)

Employment & Earnings

Current information on employment and earnings by industry are compiled by the U.S. Bureau of Labor Statistics, Department of Labor. The data differ somewhat from employment figures compiled by the Census Bureau as a different procedure is used in compiling the figures.

BLS data indicate a steady decline in employment in the U.S. footwear industry. Preliminary figures for the month of February 1984 show total employment in the nonrubber footwear industry at 130,600, down 1.4% compared with the same month a year ago. Employment in men's nonrubber footwear was up slightly (+0.4%), while in the women's segment employment dropped 1.1%.

Footwear Industries of America reports that 19 factories were closed in the first five months of 1984 with a loss of 2,000 jobs; 17.3% of the nation's shoe workers were reported to be out of work in the first three months of the year.

For the year 1983, employment in the nonrubber footwear industry in the U.S. registered an average decline of 2.8% compared with 1982. Employment in the nonrubber footwear industry is now about half of its peak level reached in 1967.

The decline in 1983, however, was not as sharp as the dip in the recession year 1982. Total employment for that year was down 6.6% in nonrubber footwear and 7.5% in rubber/plastic footwear compared with 1981.

Employment in women's footwear held up better in 1983 than in men's. The total in the former dropped less than one percent, while employment in men's footwear declined 5.3%. In the rubber/plastics footwear industry, total employment in 1983 declined 3.6% compared with 1982, following a sharper drop (-10.2%) in 1982 compared with 1981.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Average hourly earnings in the footwear industry continued to gain in 1983. In the men's footwear industry, hourly earnings for production workers averaged $5.50 in 1983 compared with $5.35 the previous year; in the women's footwear segment, hourly earnings averaged $5.16 compared with $5.01 in 1982. In the rubber/plastics footwear industry, earnings in 1983 averaged $5.16 hourly, up from $5.13 in 1982, according to the Bureau of Labor Statistics.

Labor costs are cited as a prime factor in the inability of U.S. manufacturers of footwear to stem the tide of imports which now account for over 65% of total supply. The domestic industry is working hard to meet this competition by updating and improving plants, installing labor-saving machinery. An analysis by Value Line Inc. showed average labor costs in the industry now at 22% of average operating expenses, down from 29% a few years ago. Labor costs were reported to account for 23.8% of footwear factory prices, or average, in 1983.

Employment & Earnings in the U.S. Footwear Industry, 1981-1983

	Annual Average Employment (in Thousands)					
	Total Employees			Production Workers		
	1983	1982(r)	1981(r)	1983	1982	1981
Nonrubber footwear, total*	132.8	136.8	146.4	113.2	116.5	125.9
Men's, except athletic	52.2	55.1	59.6	42.2	45.5	51.1
Women's, except athletic	52.1	52.5	54.7	46.2	45.8	47.0
Rubber/plastics footwear	18.6	19.3	21.5	15.7	16.7	19.0

	Production Workers					
	Avg. Weekly Hours			Avg. Weekly Earnings ($)		
	1983	1982(r)	1981(r)	1983	1982(r)	1981(r)
Nonrubber footwear, total*	36.2	35.1	36.3	190.77	179.71	174.97
Men's, except athletic	36.8	35.3	37.4	202.40	188.86	189.24
Women's, except athletic	35.9	34.8	35.3	185.24	174.35	165.20
Rubber/plastics footwear	38.1	40.0	41.3	196.90	193.91	178.40

(r) = revised
* Includes infants', children's, youths' & athletic footwear not separately shown.

Source: U.S. Department of Labor,
Bureau of Labor Statistics,
Employment & Earnings.

GENERAL INDUSTRY STATISTICS

Selected Data on Employment & Earnings in the Footwear Industry

	1983(p)	1982	1981
All employees	132,800	136,800	146,400
Women employees	87,200	90,400	96,600
Production workers	113,100	116,500	125,900
Gross average hourly earnings	$ 5.27	$ 5.12	$ 4.82
Productivity: pair produced per hour	1.67	1.67	1.62
Unit labor cost	3.16	3.06	2.97
Share of average price accounted for by labor	23.8%	23.3%	23.1%

(p) preliminary

Source: U.S. Bureau of Labor Statistics & Footwear Industries of America.

Industry Concentration/Plant Closings

The footwear industry is composed primarily of a large number of privately-owned companies. According to the Bureau of Industrial Economics 70% of the producers of nonrubber footwear make under one million pairs annually. These producers account for only about 17% of total production. Twenty producers, each with annual production of more than three million pairs, are said to account for over 50% of total nonrubber footwear production. In 1969 manufacturers of this size accounted for only 37% of the total output.

The trend toward greater concentration of footwear production among large companies able to withstand the competition of imports is expected to continue. The strongest companies have started or expanded their own importing operations, while weaker companies have closed plants or gone out of business.

Concentration of the footwear industry based on employment size has been reported by the U.S. Bureau of the Census for 1981 as noted below.

Distribution of Footwear Manufacturing Establishments & Total Employees By Employment Size Classification, 1981

	Establishments		Total Employees	
	Number	%	Number	%
Nonrubber footwear industry	700	100.0	130,467	100.0
Employment size classification:				
Under 10	107	15.3	340	0.3
10 to 49	135	19.3	3,859	3.0
50 to 99	77	11.0	5,806	4.4
100 to 249	169	24.1	30,782	23.6
250 to 499	175	25.0	61,400	47.1
500 to 999	30	4.3	28,280	21.6
1,000+	7	1.0		

(continued)

GENERAL INDUSTRY STATISTICS

Distribution of Footwear Manufacturing Establishments & Total Employees By Employment Size Classification, 1981
(continued)

	Establishments		Total Employees	
	Number	%	Number	%
Rubber/plastics footwear industry	69	100.0	20,290	100.0%
Employment size classification:				
Under 50	32	46.4	na	--
50 to 99	6	8.7	540	2.7
100 to 249	11	15.9	na	--
250 to 499	10	14.5	3,968	19.6
500 to 999	3	4.3	1,958	9.6
1,000+	7	10.1	11,817	58.2

na = not available

Source: U.S. Bureau of the Census,
County Business Patterns, 1981

According to data compiled by Footwear Industries of America, a net total of 234 footwear manufacturing plants were closed in the U.S. in the 1972-1982 period. Closings have continued to outnumber plant openings in 1983-1984.

Nonrubber Footwear Plant Closings & Openings, 1972-1982

	1972	1973	1974	1975	1976	1977	1978	1979	1980	1981	1982
Plant closings	66	61	76	61	30	39	34	52	26	38	33
Plant openings	29	33	32	17	28	27	44	23	10	19	10
Net openings or (closings)	(37)	(18)	(44)	(44)	(2)	(12)	10	(29)	(16)	(19)	(23)

Source: Footwear Industries of America

Location of the Industry

According to Census Bureau data for the year 1980, the footwear industry was concentrated in five states, each of which had over 10,000 employees in nonrubber footwear manufacturing plants: Maine (12.7% of the U.S. total), Missouri (11.7%), Tennessee (10.1%), Pennsylvania (8.3%), Massachusetts (8.6%).

The New England States, which accounted for 23.7% of nonrubber footwear production in 1982, were reported to account for 27.4% of industry employment and 29.1% of payrolls as of 1980.

GENERAL INDUSTRY STATISTICS

Location of the Industry

Regional Distribution of Employment & Payrolls
In The Nonrubber Footwear Industry, 1980

	Employment	Payrolls
Total	126,052	$1,146,495
	100.0%	100.0%
New England	27.4	29.1
Middle Atlantic	14.5	14.8
North Central Region	23.3	24.2
South & West	34.1	31.3
Geographic area not specified*	0.7	0.6

* Represents estimated data for establishments of small companies, typically those with fewer than five employees, that were not included in the Census Bureau mailing panel.

Source: Current Industrial Reports, MA-31A,
U.S. Bureau of the Census.

Over 300 plants have closed in the past 10 years, according to Footwear Industries of America. In 1972-1982, shutdowns in major shoe states were reported as follows: Maine 52, Massachusetts 55, New Hampshire 40, Pennsylvania 63, New York 44, Illinois 12, Ohio 8, Missouri 30, Wisconsin 24, Arkansas 13, Tennessee 17.

In view of the decision of the International Trade Commission not to apply restraints to the quantity of shoes imported into the U.S., a number of plants have announced plans to go out of business.

MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES

Operating profits for fiscal 1983 reported for the 10 leading footwear manufacturing companies in the U.S., and related data are summarized below. Composite sales of footwear by the 10 leaders amounted to over $3.5 billion, representing an 8.5% gain over the comparable 1982 total, measured in current dollars.

Sales & Profits of Leading Publicly-Held Footwear Manufacturers,
1982, 1983

	Footwear Sales (Mil. $)		Footwear Operating Profit (Mil. $)		Footwear's % Contribution To Total Company: Sales		Footwear's % Contribution To Total Company: Operating Profit	
	1983	1982	1983	1982	1983	1982	1983	1982
U.S. Shoe Corp.	$ 741.9	$ 670.9	$ 85.1	$ 72.0	49%	53%	52%	55%
Nike, Inc.	666.5	580.3	nr	nr	77	89	nr	nr
Interco, Inc.	565.9	546.0	58.5	57.1	21	21	24	28

(continued)

MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES

Sales & Profits of Leading Publicly-Held Footwear Manufacturers, 1982, 1983
(continued)

	Footwear Sales (Mil. $)		Footwear Operating Profit (Mil. $)		Footwear's % Contribution to Total Company: Sales		Footwear's % Contribution to Total Company: Operating Profit	
	1983	1982	1983	1982	1983	1982	1983	1982
Genesco, Inc.	$448.2	$451.4	$ 17.4	$ 14.9	70%	68%	73%	52%
Wolverine World Wide*	353.1	294.6	25.2	24.6	nr	nr	nr	nr
Stride Rite Corp.	301.7	224.8	30.2	22.5	100	100	100	100
Chesebrough-Pond's, Inc. (G.H. Bass & Co.)	143.8	140.2	5.3	17.8	8	9	2	8
Suave Shoe Corp.	111.5	121.9	4.1	12.7	nr	nr	nr	nr
Weyenberg Manufacturing	103.6	97.5	6.9	6.4	100	100	100	100
R.G. Barry Corp.	102.7	134.0	3.1	4.2	100	100	100	100

NOTE: Footwear sales and operating profit include both manufacturing and retailing operations, where applicable.

nr = not reported.

*Figures are total company sales of continuing operations only.

Source: Fairchild Market Research Division
based on annual reports.

Profit and loss data for the footwear industry, compiled by Kurt Salmon Associates, showed the improvement in market conditions in 1983 compared with the deep recession year 1982. Net income in the industry reached 4.72% of net sales, up from 3.53% the previous year, and was the best performance in recent years.

U.S. Footwear Industry Profit & Loss, 1979-1983
(Fiscal Periods)

	1983	1982	1981	1980	1979
Reported net sales (000)	$4,216.3	$3,729.8	$3,325.8	$2,770.1	$2,234.8
Net sales - %	100.00	100.00	100.00	100.00	100.00
- Cost of goods sold	65.32	66.54	66.58	66.31	66.37
Gross profit	34.68	34.46	33.42	33.69	33.63
- Sell, gen., admin. exp.	24.55	24.39	24.29	24.80	24.88
Operating earnings	10.13	9.08	9.13	8.89	8.74
- Interest expense	1.52	1.84	1.71	1.50	1.31
Misc. income or expense	0.26	- 0.72	0.29	0.15	0.15
Income before tax	8.87	6.52	7.71	7.54	7.59
- Income tax	4.16	3.00	3.41	3.45	3.61
Income after tax	4.71	3.53	4.30	4.08	3.98
Extraordinary item	0.01	0.00	0.01	0.00	0.05
Net income	4.72	3.53	4.31	4.09	4.04

Source: Kurt Salmon Associates

MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES

Domestic shoe companies (manufacturers and importers) showed a pretax profit of 7.5% on their U.S. operations in 1983, according to findings in a survey conducted by the International Trade Commission (ITC) in preparation for hearings on Section 201 (pertaining to protection from imports). This compares with the 6.9% profit margin posted in 1982, 8.3% in 1981, 8.1% in 1980 and 6.2% in survey findings for 1979.

The validity of the 1983 findings, however, has been questioned by industry spokesmen, who have pointed out that of the 91 responding firms, 54 (59.3%) produced under 1 million pairs of nonrubber footwear per year; 27 firms (40.7%) produced 1 million or more. Industry-wide figures, however, indicate that about 70% of the industry's firms produce under 1 million pairs. A more-representative sample, according to critics, would have produced a lower profit average.

In May 1982 the Bureau of Economics, Federal Trade Commission, released an Annual Line of Business Report covering financial ratios of industries in the U.S., including the footwear industry, in 1976.

Selected Operating Ratios in the U.S. Footwear Industry, 1976

Ratio	Rubber/Plastic Footwear		Nonrubber Footwear		Av. For All Mfg. Industries
	%	Rank	%	Rank	%
Operating income to assets	2.0	225	13.5	115	12.3
Operating income to sales	1.6	223	6.9	151	7.7
Media advertising expense to sales	2.8	43	1.4	72	1.2
Total selling expense to sales	19.5	21	9.5	86	6.6
Company financed R&D to sales	0.7	131	0.2	193	1.7
Total assets to sales	76.6	56	50.8	194	--

Source: Federal Trade Commission, Statistical Report: Annual Line of Business Report, 1976

Advertising Expenditures

Management consultants Schonfeld & Associates, Evanston, Illinois, compile an annual study of advertising expenditures based on an analysis of companies' 10-K Reports. These are filed by publicly-owned companies with the Securities & Exchange Commission. Total spending for advertising--including both media and non-media spending, production, etc.--included in the detailed report issued by Schonfeld for 1982 was summarized in the August 15, 1983, issue of Advertising Age, as noted below.

It should be noted that the percents are based on a composite of all reports, including companies which advertise and those who do not.

MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES

Advertising Expenditures

Nonrubber Footwear Industry Advertising Expenditures

Year	Advertising Expend. % of Sales	Advertising Expend. % of Margin	Annual Growth Rate %
1982	3.0	7.9	5.9
1981	3.0	8.2	nr

nr = not reported.

Source: Schonfeld & Associates; Advertising Age. (August 15, 1983)

PRODUCTION

Capacity utilization in the U.S. footwear industry dropped sharply in 1982 due to the pressure of imports and to poor economic conditions, and then went lower in 1983, according to preliminary figures compiled by the U.S. International Trade Commission. The 1983 rate was 70.2%; 1982, 73.4%; 1981, 80.1%; 1980, 77.6%; 1979, 73.5%. Figures compiled by Footwear Industries of America for 1982 showed the lowest utilization rate to be in youths' and boys' nonrubber footwear (42.3%), and for men's footwear and infants' footwear (64.7% and 64.4%, respectively). The highest rate in 1982 was in athletic footwear plants (84.8%).

Nonrubber Footwear

In the first quarter of 1984 production of nonrubber footwear in U.S. plants dropped about 7% below the level in the comparable 1983 period. Production of men's footwear was down 6.7%; women's, down 8.7% and athletic footwear (other than rubber/plastic) off a sharp 40.2%. Production of juvenile footwear, however, in the first quarter of 1984 registered an 8.7% gain.

Final figures are not yet in for the year 1983. However, preliminary Census Bureau reports indicate a decline of less than 1% in the total production of nonrubber footwear (including slippers) compared with the year 1982. The 1983 total was estimated at 340,966,000 pairs compared with the revised total of 342,380,000 pairs in 1982. Production in 1982 fell 8.0% below the 1981 total, continuing the downward trend begun in 1968 when production exceeded 640 million pairs.

Total production of women's nonrubber footwear in 1983 was down 2.4%. However, the drop in specific types was much sharper--masked by a strong gain (+55%) in U.S. production of women's boots.

Men's footwear generally outperformed women's in 1983. Production of men's footwear (except work shoes) gained about 18% over 1982, according to preliminary data, but was, however, below the 1982 level.

PRODUCTION

Rubber/Plastics Footwear

The rubber/plastics footwear industry is composed of two distinct product classes: (1) rubber and plastics protective footwear (hunting boots, galoshes, rubbers, industrial productive footwear, etc.) and (2) rubber or plastic-soled footwear with fabric upper (tennis shoes, sneakers, nonleather athletic footwear and such specialties as espadrilles and other leisure shoes).

Preliminary figures from the Census Bureau for the first three months of 1984 show production of the sneaker type rubber/plastic footwear to be down 9.8%, while protective footwear declined 2.1% compared with the same 1983 period.

This follows a sharp decline in the tennis shoe/sneaker type of footwear in 1983. Production was off over 16% following a 7.1% decline in 1982 compared with 1981.

Rubber/plastic protective footwear output was down 31.4% in 1983, following a 32.6% decline in the previous year.

U.S. Production of Footwear by Type, 1981-1983
(Thousands of Pairs)

	1983(p)	1982(r)	1981(r)	% Change	
				1983/82	1982/81
Footwear total (nonrubber & rubber/plastics excluding protective footwear)	415,018	431,010	467,396	- 3.7%	- 7.8%
Nonrubber footwear, including slippers	340,966	342,380	371,997	- 0.4	- 8.0
Shoes & boots, incl. athletic, total	279,904	277,488	302,228	- 0.9	- 8.2
Men's (excl. athletic)	77,980	71,986	87,192	--	- 17.4
Shoes, dress & casual	49,251	41,792	50,474	+ 17.8	- 17.2
Boots, dress & casual	12,103	10,191	16,048	+ 18.8	- 36.5
Western style	nr	6,612	11,027	--	- 40.0
Work shoes (ankle height or higher)	16,404	19,730	20,339	- 16.9	- 3.0
Steel toes	nr	6,255	6,964	--	- 10.2
Type not specified	222	273	331	- 18.7	- 17.5
Youths' & boys' (excl. athletic)	8,243	9,518	11,266	- 13.4	- 15.5
Boots	nr	1,039	1,252	--	- 17.0
Women's (excl. athletic)	128,547	131,766	135,069	- 2.4	- 2.4
Sandals	116,544	16,864	20,789	- 5.6	- 18.9
Casuals		63,440	58,562		+ 8.3
Dress		43,219	46,611		- 7.3
Boots (ankle height or higher)	11,216	7,252	8,088	+ 54.7	+ 10.3
Type not specified	787	991	1,019	- 20.6	- 2.7
Misses' (excl. athletic)	7,879	8,876	9,902	- 11.2	- 10.4
Children's (excl. athletic)	13,785	11,399	12,921	+ 20.9	- 11.8
Boots	nr	1,776	1,693	--	+ 4.9
Infants' & babies'	21,188	22,587	23,617	- 6.2	- 4.4

(continued)

U.S. Production of Footwear by Type, 1981-1983
(Thousands of Pairs)
(continued)

				% Change	
	1983(p)	1982(r)	1981(r)	1983/82	1982/81
Athletic (except with sole vulcanized to fabric upper)	16,396	16,648	17,831	- 1.5%	- 6.6%
Designed for sports	nr	6,474	7,674	--	- 15.6
All other (joggers, etc.)	nr	10,174	10,157	--	+ 0.2
Up to size 3	nr	1,191	1,543	--	- 22.8
Size 3 & over	nr	8,983	8,614	--	+ 4.3
All other shoes, except those with rubber or plastic soles, fabric uppers & rubber/plastic protective footwear (Includes ballet & other theatrical shoes, for example)	3,703	3,355	2,698	+ 10.4	+ 24.3
Shoes exc. men's/women's, type not specified	916	1,005	1,075	- 8.8	- 6.5
Slippers	61,062	64,892	69,769	- 5.9	- 7.0
Men's, youths', boys'	nr	14,591	17,135	--	+ 14.8
Women's, misses'	nr	42,873	45,545	--	- 5.9
Children's, babies', infants	nr	6,853	6,467	--	+ 6.0
Type not specified	nr	575	622	--	- 7.6
Shoes with rubber of plastic soles/ fabric uppers	74,052	88,630	95,399	- 16.4	- 7.1
Fabric upper espadrilles	nr	1,309	nr	--	--
Fabric upper cement process	nr	5,415	nr	--	--
All other	nr	81,906	88,872	--	- 7.8

(p) preliminary
(r) revised
nr = not reported

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA-31)

Preliminary information for the year 1983 indicates a sharp decline in U.S. manufacturers' production of protective footwear, with output reaching under 10 million pairs. This follows the 32.6% surge in production in 1982 compared with 1981.

PRODUCTION

U.S. Production of Rubber & Plastic Protective Footwear, 1981, 1982
(Thousands of Pairs)

	1983(p)	1982	1981	% Change 1982/1981
Total	9,685	14,125	10,652	+ 32.6
Rubber upper protective footwear	nr	6,721	4,973	+ 35.1
Boots	--	2,072	1,511	+ 37.1
Lumberman & pacs	--	nr	nr	--
Arctics & gaiters	--	1,744	1,043	+ 67.2
Light & heavy rubbers	--	nr	nr	--
Plastic upper protective footwear	nr	6,027	4,701	+ 28.2
Fabric upper protective footwear	nr	1,377	978	+ 40.8

(p) preliminary
nr = not reported

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA-31)

Boots

In 1981 and 1982 the Census Bureau reported data on boots, which had become a major fashion item. Data for 1983 are incomplete at this time, but boot production data currently available for 1981-1983 is recaped below.

After two years of extraordinary growth, demand for western boots dropped sharply in mid-1982, and production for the year was down 40% compared with 1981 as the popularity of the cowboy look dwindled. However, there are now signs for a pick-up in demand for western boots after a 2-year sales slump.

Recap.
Summary of Production of Boots in the U.S., 1981, 1982
(Thousands of Pairs)

	1983(p)	1982(r)	1981(r)
Boots except rubber/plastic, total			
Men's dress & casual, total	12,103	10,191	16,048
Western style	nr	6,612	11,027
Youths', boys'	nr	1,039	1,252
Women's, ankle height or higher	11,216	7,252	8,088
Children's	nr	1,776	1,693
Boots, rubber/plastic	nr	2,072	1,511

(p) preliminary
(r) revised
nr = not reported

Source: U.S. Bureau of the Census, Current Industrial Reports.

PRODUCTION

Percentage Distribution of U.S. Production of Footwear By Categories, 1979-1983

	1983	1982	1981	1980	1979
Total nonrubber footwear	100.0%	100.0%	100.0%	100.0%	100.0%
Men's, youths', boys'	25.3	23.8	26.5	26.4	26.0
Women's, misses'	40.0	41.1	38.9	39.9	40.0
Children's, infants'	10.3	9.9	9.8	9.9	9.3
Athletic	4.8	4.9	4.8	3.9	5.1
All other	19.6	20.3	19.9	19.9	19.5

Source: International Trade Commission based on U.S.
Bureau of Census statistics

Seasonal Pattern in Production

Percent of Year's Total Production by U.S. Manufacturers, by Months, 1983

(Based on quantity)

	Nonrubber Footwear Total *	Men's	Women's	Juvenile	Athletic	Slippers
Total, year 1983	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	8.9	7.6	8.1	8.5	9.4	8.4
February	10.2	9.9	9.1	8.8	13.4	8.4
March	10.1	9.2	9.0	8.9	11.5	9.4
April	8.7	8.4	7.5	7.5	10.3	7.6
May	9.6	8.7	8.6	9.1	10.2	8.5
June	9.1	8.6	8.1	8.8	8.0	8.2
July	7.2	6.5	7.5	7.1	4.3	4.9
August	9.8	8.8	9.3	8.5	6.7	9.5
September	9.6	8.8	9.0	8.7	5.3	9.2
October	9.3	8.3	8.5	8.2	6.6	9.7
November	8.9	7.6	7.8	8.3	6.7	9.8
December	8.0	7.6	7.5	7.6	7.6	6.4

* Includes other nonrubber footwear not separately reported.

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports.

By Geographic Region of the U.S.

The 7.8% decline in U.S. production of nonrubber footwear in 1982 compared with 1981 was shared (though not equally) by producers throughout the U.S. Factories in New England and in the North Central regions were able to do better than the overall average, thus upping their shares of total production.

New England's share of nonrubber footwear production went from 23.2% in 1981 to 23.7% in 1982. The North Central Region's share increased from 22.7% to 23.9%.

PRODUCTION

By Geographic Region of the U.S.

Production of Nonrubber Footwear by Geographic Area & by Leading States--1981, 1982

	Thousands of Pairs		Percent of Total	
	1982	1981(r)	1982	1981
Nonrubber footwear, U.S. total	342,380	371,997	100.0%	100.0%
New England Division	81,243	86,295	23.7	23.2
Maine	40,459	40,981	11.8	11.0
Massachusetts	24,150	27,718	7.0	7.4
New Hampshire	16,634	17,596	4.9	4.7
Middle Atlantic Division	69,209	75,449	20.2	20.3
New York & New Jersey	37,208	38,565	10.9	10.4
Pennsylvania	32,001	36,884	9.3	9.9
North Central Region	81,706	84,317	23.9	22.7
Illinois	7,103	7,362	2.1	2.0
Wisconsin	6,536	7,149	1.9	1.9
Missouri	37,423	39,587	10.9	10.6
Other states	30,644	30,219	8.9	8.1
South & West Regions	107,378	122,889	31.4	33.0
North Carolina	9,341	9,024	2.7	2.4
Tennessee	26,512	33,138	7.7	8.9
Georgia	4,794	5,689	1.4	1.5
Arkansas	12,565	13,767	3.7	3.7
Kentucky	4,517	4,666	1.3	1.2
Texas	11,774	14,110	3.4	3.8
California	7,095	6,912	2.1	1.9
Other states	30,780	35,583	9.0	9.6
Other*	2,844	3,047	0.8	0.8

*Estimated data for very small companies not included in the mailing panel.

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA31A)

Materials

Rising demand for cattlehides on the part of U.S. tanners has caused an escalation in prices. In the first eight months of 1983, according to the Department of Commerce, the composite average monthly price of three types of cattlehide leather was 49.4 cents a pound, up from 45.7 cents in the same 1983 period. Prices have risen sharply in 1984, however, and will likely exceed the historic high established in 1979 of 75 cents per pound. The producer price index for upper leather as of March 1984 was 16.5% above the level a year earlier and 2.0% above the level in February 1984. Strong demand on the part of European buyers has contributed to this price escalation.

PRODUCTION

Materials

Preliminary information on nonrubber footwear production in the U.S. in 1983 indicates that, overall, 55% of pairs produced had leather uppers, up from 53.2% in 1982, 53.0% in 1981.

Production of Nonrubber Footwear by Material in Uppers
(Shoes, Boots & Slippers)

	1982(r)		1981		1980	
	Mil. Pairs	%	Mil. Pairs	%	Mil. Pairs	%
Total production	342.4	100.0%	372.0	100.0%	386.3	100.0%
Type of upper:						
Leather	182.2	53.2	197.3	53.0	203.7	52.7
Plastic (vinyl)	83.4	24.4	92.2	24.8	108.6	28.1
Other	73.9	21.6	79.4	21.3	70.9	18.4
Not specified	2.8	0.8	3.1	0.8	3.2	0.8

(r) revised

Source: Based on U.S. Bureau of the Census reports.

While production of footwear by U.S. manufacturers has been on the decline, the share of U.S. production accounted for by shoes with leather uppers has held at about 64%. Men's shoes have the highest percentage of leather uppers (almost 91% in 1982). Not including rubber/plastic soled athletic footwear, athletic shoe types made in the nonrubber footwear classification have registered a sharp decline in the percentage with leather uppers in recent years.

Share of U.S. Production of Selected Types of Nonrubber Footwear
Which Have Leather Uppers

	Percent of Total		
	1982(r)	1981(r)	1980
Leather uppers in shoes, total*	63.6%	63.7%	63.5%
Men's shoes, except athletic	90.8	87.9	86.7
Women's shoes, except athletic	54.8	54.2	54.8
Athletic footwear	49.9	51.5	68.6

* Includes shoe types not separately listed
(r) revised

Source: Based on U.S. Bureau of the Census, Current Industrial Reports.

Allowing for imports, the total supply of footwear available to consumers shows a different picture in regard to types of upper material and leather's share is sharply reduced.

PRODUCTION

Materials

Preliminary data on the overall supply of nonrubber footwear in the U.S. in 1983 indicates a growth in the percentage of women's nonrubber footwear and of athletic footwear which had leather uppers. In men's footwear, however, the trend away from leather uppers continued and the percentage accounted for by leather was sharply below the 1979 level.

Allowing for U.S. production, less exports, plus imports, the following shows the total apparent consumption of footwear accounted for in terms of types of upper materials.

Percent Distribution of Apparent U.S. Consumption of Footwear
By Types of Upper Material

Nonrubber Footwear	1983(p)	1982	1981	1980	1979
Nonrubber footwear, total					
Leather	49.3	48.4	49.6	47.4	48.6
Plastic	28.9	31.5	32.9	36.9	34.3
All other	21.8	20.1	17.5	15.7	17.1
Men's, youths', boys', except athletic					
Leather upper	56.6	58.6	67.1	67.9	72.8
Plastic	18.3	18.9	24.6	25.7	21.1
All other	25.1	22.5	8.3	6.4	6.1
Women's, misses', except athletic					
Leather	47.1	43.8	45.9	41.4	43.8
Plastic	39.1	43.7	42.3	47.8	41.8
All other	13.8	12.5	11.8	10.8	14.4
Children's (except athletic), infants'					
Leather	28.5	33.3	37.8	36.6	43.6
Plastic	32.9	37.3	35.6	43.7	38.1
All other	38.6	29.4	26.6	19.7	18.3
Athletic footwear (not incl. rubber/plastic soled)					
Leather	14.3	11.0	9.0	8.4	9.2
Plastic	11.6	14.6	14.5	20.6	22.8
All other	74.1	74.4	76.5	71.0	68.0

Source: Prehearing Report, U.S. International Trade Commission, based on U.S. Dept. of Commerce data. (April 1984)

SHIPMENTS

Monthly estimates on production and shipments of footwear by U.S. manufacturers based on mail surveys are compiled by the U.S. Census Bureau in the Current Industrial Reports series. Annual estimates on a broader base are issued by the Bureau in the Annual Surveys of Manufactures (of which the most recent report covers 1981) and in the complete census of manufactures compiled every five years (1982 data to be issued in 1984-1985).

In the first three months of 1984, according to CIR data, nonrubber footwear shipped by U.S. plants declined 6.6% in quantity and 5.3% in value compared with January-March 1983. In the same period, there was a decline of 4.0% in quantity of rubber/plastic footwear of the sneaker type, and value was off under 1%. Shipments of rubber/plastic protective footwear were up slightly (+0.3%) in quantity, but value was reported to be off 7.5%.

The Bureau of Industrial Economics, U.S. Department of Commerce, has issued the following estimates on total footwear shipments by all producers in the U.S.

Value of Footwear Shipments By All U.S. Producers, 1979-1983

	Millions of Current $				Compound Annual	Est.	% Change
	1983*	1982*	1981	1979	Growth Rate, 1972-83	1984	1984/83
Nonrubber footwear							
Total value	$4,655	$4,576	$5,221	$4,261	3.6%	--	--
Men's (exc. athletic)	1,903	1,757	2,156	1,749	4.4	--	--
Women's (exc. athletic)	1,796	1,851	1,995	1,617	2.6		
Slippers	197	239	268	258	2.0		
Footwear, n.e.c.	759	729	802	637	4.3		
	Millions of 1972 $						
Total value	2,225	2,258	2,631	2,412		$2,190	- 1.6%
Men's (exc. athletic)	812	757	958	864	- 3.3	820	1.0
Women's (exc. athletic)	894	968	1,078	1,002	- 3.7	867	- 3.0
Slippers	99	123	136	150	- 4.2	100	- 1.0
Footwear, n.e.c.	420	410	459	396	- 1.1	403	- 4.0
Rubber/plastics footwear	Millions of Current $						
Total value	560	560	561	478	1.1	--	--
	Millions of 1972 $						
Total value	333	335	339	311	33.5	330	- 0.9

*Estimated by BIE. The Census Bureau's figures for 1982, published in the Current Industrial Reports Series (on which figures shown in the PRODUCTION section of this Fact File are based) differ somewhat from the above and are covered in the following table.
n.e.c. = not elsewhere classified.

Source: U.S. Bureau of Industrial Economics, 1984 U.S. Industrial Outlook.

SHIPMENTS

Quantity & Value of Shipments, 1981, 1982
By Type of Footwear

	Quantity (thous. pairs)		Value (mil. $)		% Change 1982/83	
	1982	1981	1982	1981	Quantity	Value
Nonrubber footwear, total	346,434	374,785	$4,551.3	$4,816.8	- 7.6%	- 5.5%
Men's (exc. athletic)	75,332	87,364	1,871.7	2,060.3	- 13.8	- 9.1
Dress & casual	44,193	51,386	914.1	986.2	- 14.0	- 7.3
Boots, western style	7,791	11,513	368.6	461.4	- 32.3	- 20.1
Boots, dress, casual	3,097	4,138	82.3	109.5	- 25.2	- 24.9
Workshoes	19,960	19,990	499.4	496.5	- 0.2	+ 0.6
Shoes, n.s.k.	291	337	7.2	6.6	- 13.6	+ 9.1
Youths' & boys' (except athletic)	9,190	10,732	89.5	103.5	- 14.4	- 13.6
Women's (except athletic)	131,151	136,077	1,797.2	1,815.1	- 3.6	- 1.0
Sandals	18,198	20,552	196.3	243.3	- 11.5	- 19.3
Casual, exc. sandals	61,301	59,641	745.3	674.5	+ 2.8	+ 10.5
Dress	43,334	46,925	626.0	635.2	- 7.6	- 1.4
Boots	7,351	7,945	216.2	248.8	- 7.5	- 13.1
Shoes, n.s.k.	975	1,014	13.4	13.4	- 3.8	--
Misses' (except athletic)	8,516	9,991	80.4	105.6	- 14.8	- 23.8
Children's (except athletic)	11,169	13,098	107.1	122.3	- 14.7	- 12.4
Babies'	22,930	24,709	123.9	134.9	- 7.2	- 8.1
Athletic	17,188	17,221	226.1	214.4	- 0.2	+ 5.4
All other	4,104	3,511	23.8	21.4	+ 16.9	+ 11.2
Other	1,127	1,208	9.9	10.2	- 6.7	- 2.9
Slippers	65,727	70,874	221.9	228.1	- 7.3	- 2.7
Men's, youths', boys'	14,894	16,639	64.0	61.3	- 10.5	+ 4.4
Women's, misses'	43,674	47,156	144.2	151.2	- 7.4	- 4.6
Children's, babies'	6,553	6,427	11.6	13.6	+ 2.0	- 14.7
Slippers, n.s.k.	606	652	2.0	2.1	- 7.0	- 4.8
Rubber/plastic footwear						
Rubber/plastic sole/fabric upper, total	89,175	94,935	507.0	526.9	- 6.1	- 3.8
Rubber/plastic protective footwear, total	14,099	11,094	131.6	107.2	+ 27.1	+ 22.8
Rubber upper	6,504	5,363	73.5	57.1	+ 21.3	+ 28.7
Plastic upper	6,183	4,701	45.7	38.5	+ 31.5	+ 18.7
Fabric upper	1,412	978	12.5	11.6	+ 44.4	+ 7.8

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census, Current Industrial Reports Footwear, 1982 (MA31A(82)-1).

SHIPMENTS

Focusing on boots, which have enjoyed fashion significance in recent years, there was a marked downturn in popularity after 1981, particularly in men's western styles. Detailed figures for 1983 are not currently available, but following is the trend in shipments of boots by U.S. manufacturers from 1980-1982. In recent months there are signs of a revival in consumers interest in western boots.

Recap.

Quantity & Value of U.S. Shipments of Boots, 1980-1982

	Quantity (thous. pairs)			Value (millions of $)		
	1982	1981	1980	1982	1981	1980
Total reported	20,225	25,107	25,738	$ 699.8	$ 844.3	$ 720.8
Men's boots	10,888	15,651	14,521	450.9	570.9	483.9
Western style	7,791	11,513	14,521	368.6	461.4	483.9
Dress & casual	3,097	4,138		82.3	109.5	
Women's boots	7,351	7,945	8,778	216.2	248.8	207.3
Rubber boots	1,986	1,511	2,439	32.7	24.6	29.6

Source: U.S. Bureau of the Census, Current Industrial Reports.

Shipments by Class of Customer

The latest information issued by the Census Bureau covering the distribution of U.S. manufacturers' shipments (value) by class of customer is for the year 1980. Independent wholesalers are of minor importance in the footwear distributuion picture.

Distribution of Manufacturers' Sales of Shoes & Slippers
By Class of Customer, 1980
(Not Including Rubber/Plastic Footwear)

	Type of Footwear				
	Men's Shoes, Exc. Athletic	Women's Shoes, Exc. Athletic	Athletic Footwear	All Other Footwear	Slippers
Total shipments	100.0%	100.0%	100.0%	100.0%	100.0%
Retail stores & outlets of this company	22.9	18.4	37.9	23.1	5.6
Independent retailers	27.0	32.0	10.6	28.5	22.7
All other retailers	38.5	39.1	22.7	29.0	59.3
Wholesalers	8.2	7.4	28.3	18.5	10.2
All others, incl. govt. & for export	3.4	3.1	0.8	0.9	2.2
Total sales (mil. $)	$2,000.2	$1,763.6	$245.9	$469.4	$253.1

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Series MA-31A.

PRODUCER (FACTORY) PRICES

As of March 1984 producer prices for footwear of all types averaged 2% above the level in the same 1983 month and were 5.6% above the March 1982 average. Rising leather and freight charges in 1984 indicate a sharper rise in footwear prices in the last half of 1984 for domestic footwear and many imports.

Producer Price Indexes on Footwear
As of March, 1982-1984

		Index for March		
	Base Period	1984	1983	1982
All footwear	1967	253.3	248.1	239.8
Men's footwear	1967	291.9	285.6	281.9
With leather upper	1967	292.8	286.5	283.0
Dress, casual	12/80	108.4	106.6	104.0
Boots	12/80	111.8	111.1	113.1
Work shoes, boots	12/80	114.4	109.7	109.7
Other	12/80	108.4	107.8	109.2
With plastic upper	12/80	106.1	103.9	101.8
Women's footwear	1967	228.4	224.6	211.3
With leather upper	1967	223.1	220.4	207.7
Dress	12/80	107.1	102.4	102.0
Casual	12/80	102.4	100.3	96.9
Sandals	12/80	92.4	99.3	nr
Boots	12/80	111.0	109.1	90.3
Other	12/80	113.3	111.9	109.6
With plastic upper	12/80	103.1	98.8	94.7
Children's footwear size 8½-12	1967	214.2	208.5	205.5
Misses	6/80	102.7	101.1	99.8
Youths' & boys', size 12½-6	6/80	120.0	111.9	108.5
Infants', babies'	6/80	115.7	110.2	109.5
Athletic	6/80	102.4	101.5	102.5

Source: U.S. Bureau of Labor Statistics

Preliminary information for April 1984 showed wholesale footwear prices up 0.7% from April 1983 on a seasonally unadjusted basis. After adjustment, April prices were down 1.4% from the previous month. Prices for women's footwear declined 0.9% compared with March, and men's declined 0.4%. Wholesale prices for athletic footwear increased 0.5% in April compared with March and were 1.4% above April 1983.

FOREIGN TRADE

Imports

In the year 1983, U.S. imports of footwear of all types in terms of pairs gained almost 18% compared with the 1982 total. Nonrubber footwear imports were up 21.3% and rubber/plastic footwear imports gained 3.6%. Nonrubber footwear represented 81.5% of total pairs and 91.7% of value of imports in 1983 (measured at port of exit.)

FOREIGN TRADE

Imports

Imports have continued to surge in 1984. In the month of April they reached a record total of 70.3 million pairs of nonrubber footwear compared with 45.6 million pairs in the same month of 1983. This represents a record-breaking increase of 54.2%. Total imports in the first four months of 1984 reached a record 264.5 million pairs of nonrubber footwear, up from 206 million in the same 1983 period (a 27.9% gain).

Through the Footwear Industries Association, as well as two labor unions, the domestic nonrubber footwear industry in 1984 sought to stem the tide of imports through Section 201 of the Tariff laws covering the imposition of global quotas that would allow imports to take no more than 50% of the total U.S. market. In 1983, overall imports of nonrubber footwear accounted for 63.6% of U.S. consumption, up from 59% in 1982. In athletic footwear, imports accounted for almost 86%. Assuming that production has continued to decline while imports have risen, in the first half of 1984 imports could be accounting currently for some 75% of the U.S. market for nonrubber footwear.

However, on June 6, 1984, the United States International Trade Commission rejected the plea of the industry for protection from cheaper imports over the next five years on the basis that shoe imports had not seriously hurt American workers or businessmen, and no quotas were to be imposed. This ruling was received with dismay by U.S. manufacturers (who plan to appeal the decision and file a court suit); but hailed by importers and volume-priced retail operations, who had claimed that the protection wanted by the industry would have cost American consumers $10 billion over a five year period, as imports of lower-priced shoes would be affected much more than expensive types from Italy or Britain. The ITC noted that import growth partly reflected increased consumer spending, as domestic production stabilized at 341 million pairs.

The June ruling followed other unfavorable decisions made in 1983--the revocation of countervailing duties (CVD) applying to imports from Brazil, Spain and India, in May 1983 and the rejection of the industry's claim under Secton 301 that the widespread use of tariff and nontariff trade barriers on nonrubber footwear left the U.S. industry vulnerable to injury as an unrestricted market.

Cheaper footwear has been coming into the U.S. in growing quantity, particularly from Taiwan, South Korea and Brazil. The average value per pair of nonrubber footwear imported into the U.S. dropped from $6.43 in 1982 to $6.29 in 1983.

Taiwan is the leading source of footwear imported by the U.S. In the first quarter of 1984, Taiwan shipped 81.2 million pairs, a 20.6% gain over the total in the first quarter of 1983. Imports from Brazil have soared in recent months, and this country replaced South Korea as the second largest supplier to the U.S., shipping 26.8 million pairs, or 70.5% more than in the first quarter of 1983.

Besides efforts to meet competition from lower-priced imports through the installation of modern labor-saving machinery and equipment, the American footwear industry has stepped up other measures--including becoming direct importers themselves of finished footwear and opening up their own retail outlets in the U.S.

The industry has not leaned heavily on Section 807 of the U.S. Tariff schedules which allows U.S. manufacturers to send components, such as cut leather uppers, offshore for assembly and then to reimport the finished product--paying duty only on the value added in the foreign factory. This was seen as becoming a bigger factor if quotas were imposed and sourcing of finished shoes offshore became too expensive.

FOREIGN TRADE

Imports

In 1983, total imports of shoes under Section 807 amounted to only $58.2 million in value, up 20%, however, from $48.5 million in 1982--with most (58.6%) coming out of Mexico, followed by Korea (18.3%).

Some large manufacturers, such as Brown Shoe Co., import components (such as fitted uppers) to assemble into finished footwear in the U.S., thus saving on labor costs while maintaining domestic factory employment at steady levels. Domestic shoe manufacturers imported 14.9 million pairs of unlasted leather uppers in 1983, up 38.5% from the 1982 total. Imports of rubber/plastic shoe uppers totaled about 11 million pairs, up 55% over 1982; imports of cotton and fiber shoe uppers rose 25.2% to reach 8.4 million pairs.

U.S. manufacturers are now accounting for a growing percentage of finished footwear imports. According to figures compiled by Volume Footwear Retailers of America (Footwear News, May 21, 1984) such imports represented 38.5% of import volume in 1983--up from 24% in 1981. Manufacturers' athletic footwear imports' share was reported at 56% in 1983. In an industry analysis by Business Trend Analysts, Inc. it was reported that imports generated 10% of U.S. manufacturers' sales in 1983. (Footwear News, June 11, 1984).

In another move to stand up under competition from imports, U.S. manufacturers are opening their own retail outlets, which can handle their own lower-priced brands sourced abroad.

Summary of Nonrubber Footwear Imports For Consumption in the U.S.
By Categories, 1979-1983
(Quantity in Thousands of Pairs)

	1983	1982	1981	1980	1979
Footwear, nonrubber, total	581,857	479,663	375,600	365,743	404,563
Men's, youths', boys' (except athletic)	133,408	105,029	70,224	68,627	70,205
Women's, misses' (except athletic)	307,913	252,857	223,007	221,334	271,627
Children's, infants'	52,276	34,577	25,010	22,165	22,236
Athletic	88,042	86,997	57,295	53,571	40,366
All other	218	204	65	46	129

Source: U.S. International Trade Commission based on U.S. Bureau of the Census data.

Compared with imports in 1979, the sharpest jump in quantity by 1983 was in children's, infants' footwear (up 135.1%), and this category registered the sharpest gain (+51.2%) in 1983 compared with 1982. Imports of athletic footwear in 1983 were 118.1% ahead of 1979, but registered a rise of only 1.2% in 1983 compared with 1982.

Imports

U.S. Footwear Imports by Type, 1982, 1983

	1983					1982		% Change 1983/1982	
	Pairs (Mil.)	% of Total	Value # (Mil. $)	% of Total	Avg. Value Per Pair	Pairs (Mil.)	Value # Mil.$	Pairs	Value
Footwear, total	$ 714.1	100.0%	$3,993.1	100.0%	$ 5.59	607.4	$3,418.6	+ 17.6%	+ 16.8%
Nonrubber footwear, total	581.9	81.5	3,662.0	91.7	6.29	479.7	3,083.9	+ 21.3	+ 18.7
Rubber/plastics footwear, total	132.3	18.5	331.1	8.3	2.50	127.7	334.7	+ 3.6	- 1.1
By type of footwear:									
Men's & boys', total	183.0	25.6	1,298.5	32.5	7.10	160.3	1,178.9	+ 14.2	+ 10.1
Women's & misses', total	316.9	44.4	1,975.7	49.5	6.23	262.9	1,610.2	+ 20.5	+ 22.7
Children's & infants', total	55.3	7.7	164.6	4.1	2.98	38.8	116.5	+ 42.5	+ 41.3
Type not specified, total	26.7	3.7	223.2	5.6	8.36	17.5	178.1	+ 52.6	+ 25.3
Dress & casual footwear, total	321.8	45.1	2,263.4	56.7	7.03	266.8	1,900.6	+ 20.6	+ 19.1
Leather uppers, total (N)	179.0	25.1	1,739.5	43.6	9.71	130.7	1,380.5	+ 37.0	+ 26.0
Men's & boys'	40.1	5.6	454.8	11.4	11.33	30.1	388.9	+ 33.2	+ 16.9
Women's & children's	137.3	19.2	1,267.5	31.7	9.23	99.6	977.5	+ 37.9	+ 29.7
Other, not specified	1.6	0.2	17.1	0.4	10.90	1.0	14.1	+ 60.0	+ 21.3
Lined vinyl uppers, total (N)	142.7	20.0	523.9	13.1	3.67	136.2	520.1	+ 4.8	+ 0.7
Men's & boys'	22.1	3.1	91.9	2.3	4.14	21.5	96.5	+ 2.8	- 4.8
Women's & children's	105.8	14.8	391.8	9.8	3.70	102.2	386.9	+ 3.5	+ 1.3
Children's & infants'	14.8	2.1	40.2	1.0	2.72	12.5	36.7	+ 18.4	+ 9.5
Athletic, total	190.5	26.7	916.0	22.9	4.81	185.0	932.5	+ 3.0	- 1.8
Leather uppers, total (N)	79.2	11.1	580.0	14.5	7.32	76.9	582.7	+ 3.0	- 0.5
Men's & boys'	55.2	7.7	437.4	10.9	7.92	57.1	456.1	- 3.3	- 4.1
Women's & children's	23.7	3.3	138.8	3.5	5.86	19.5	123.1	+ 21.5	+ 12.7
Ski boots	0.3	*	3.8	0.1	12.54	0.3	3.4	--	+ 11.8
Fabric uppers, total (R)	102.5	14.3	256.9	6.4	2.50	98.0	272.7	+ 4.6	- 5.8
Joggers	12.7	1.8	41.9	1.0	3.30	10.5	40.9	+ 20.9	+ 2.4
Sneakers	51.9	7.3	151.4	3.8	2.92	51.7	168.8	+ 0.4	- 10.3
Other	37.9	5.3	63.6	1.6	1.68	35.8	63.0	+ 5.9	+ 0.9
Lined vinyl uppers, total (R)	8.8	1.2	79.1	2.0	8.96	10.1	77.2	- 12.9	+ 2.5
Men's & boys'	4.7	0.7	18.9	0.5	4.02	6.3	26.5	- 25.4	- 28.7
Women's & misses'	2.1	0.3	8.1	0.2	3.82	2.1	9.1	--	- 11.0
Children's & infants'	0.7	0.1	2.3	0.1	3.10	0.6	2.2	+ 16.7	+ 4.5
Ski boots	1.2	0.2	49.7	1.2	39.94	1.0	39.3	+ 20.0	+ 26.5
Work footwear, leather, total (N)	8.0	1.1	93.7	2.3	11.65	6.9	84.0	+ 15.9	+ 11.5
Boots & protective footwear, nonleather, total (R)	13.5	1.9	69.5	1.7	5.13	11.1	56.2	+ 21.6	+ 23.7
Other footwear, total	180.2	25.2	650.5	16.3	3.61	137.5	445.2	+ 31.0	+ 46.1
Unsupported rubber or plastic, total (N)	30.1	4.2	102.6	2.6	3.40	26.1	93.7	+ 15.3	+ 9.5
Men's & boys'	5.3	0.7	20.2	0.5	3.81	3.5	14.4	+ 51.4	+ 40.2
Women's & misses'	21.5	3.0	73.7	1.8	3.43	20.0	72.7	+ 7.5	+ 1.4
Children's & infants'	3.3	0.5	8.6	0.2	2.57	2.6	6.6	+ 26.9	+ 30.3
Zories (R)	16.2	2.3	4.7	0.1	0.29	18.6	5.9	- 12.9	- 20.3
Fiber uppers (N)	37.5	5.2	106.2	2.7	2.83	22.3	62.8	+ 68.2	+ 69.1
Wood (N)	1.2	0.2	7.2	0.2	6.14	3.0	18.3	- 60.0	- 60.6
Other (N)	95.2	13.3	429.8	10.8	4.51	67.5	264.5	+ 41.0	+ 62.5

(N) = Nonrubber
(R) = Rubber
The import value is the wholesale value at the foreign port of exit. It does not include freight, insurance and other charges, such as U.S. import duties, incurred in bringing the merchandise to the U.S.
* Less than 0.1%.

Source: Fairchild Market Research Department based on U.S. Department of Commerce, Bureau of the Census data.

FOREIGN TRADE

Imports

Imports of rubber/plastic footwear were up only 3.6% in 1983 compared with 1982, following the 23% drop reported in 1982 compared with 1981. Figures compiled by Footwear Industries of America indicated that in rubber/plastics footwear, imports held a 58% share of the total U.S. market in 1982.

In nonrubber footwear, the biggest penetration in the U.S. market by category is in athletic footwear.

Nonrubber Footwear: U.S. Imports Relative to U.S. Consumption & To Production, 1979-1983

	1983	1982	1981	1980	1979
Ratio of Imports to Consumption					
Nonrubber footwear, total	63.6	59.0	51.0	49.5	50.9
Men's, youths', boys'	61.4	57.3	42.6	41.2	41.0
Women's, misses'	69.8	64.7	61.2	59.5	63.4
Children's, infants'	60.1	50.7	40.9	36.9	37.8
Athletic	85.8	85.3	78.6	82.9	69.0
All other	0.3	0.3	0.1	0.1	0.2
Ratio of Imports to Production					
Nonrubber footwear, total	170.5	140.1	101.0	94.7	101.4
Men's, youths', boys'	155.1	128.9	71.3	67.3	67.6
Women's, misses'	226.2	179.8	153.8	143.5	170.1
Children's, infants'	148.8	101.7	68.4	57.8	59.9
Athletic	541.3	522.6	321.3	356.2	196.6
All other	0.3	0.3	0.1	0.1	0.2

Source: U.S. International Trade Commission based on U.S. Bureau of the Census Reports.

Exports

The strong American dollar has made U.S. products more expensive abroad, and U.S. exports of footwear in 1983 were down 15.7% compared with 1982, reaching a total of 7,496 thousand pairs of nonrubber footwear. This compares with a recent peak of 12,999 thousand pairs in 1980. Value of U.S. exports were reported at $90 million in 1983. Exports of rubber/plastics footwear in 1983 are estimated at $12 million, down from $18 million in 1982.

U.S. footwear exports are concentrated in athletic, western boot, men's casual, work and hunting boot classifications. Canada, which was formerly a good customer, has announced that their quota on shoe imports, first imposed in 1977 and due to expire at the end of 1984, will be extended to March 1986. Restraints against American footwear are also in effect in other countries. Brazil will not allow American shoes to be imported; Taiwan and South Korea levy duties on U.S. footwear of more than 50%; Japan allows only one million pairs to be imported in a single year.

MARKET SUPPLY

The total supply of footwear, based on U.S. production less exports plus imports --also referred to as "apparent consumption"--reached over one billion pairs in 1982, according to the U.S. Census Bureau, of which 813 million pairs were in the nonrubber footwear classification. Preliminary figures for 1983 indicate the market supply of nonrubber footwear reached 915.6 million pairs, gaining 12.6% over the 1982 total, up 15.3% compared with 1979.

Summary of Market Supply, 1981, 1982
(Quantity in millions of pairs)

	Domestic Production		Exports		Imports		Total Supply	
	1982	1981	1982	1981	1982	1981	1982	1981
Total footwear	445.1	478.0	10.6	13.3	589.7	514.1	1,024.2	978.9
Nonrubber footwear	342.4	372.0	8.9	11.2	479.5	369.0	813.1	729.8
Rubber/plastic soles-fabric upper footwear	88.6	95.4	1.4	1.6	99.0*	137.6	186.3	231.5
Rubber/plastic protective footwear	14.1	10.7	0.4	0.6	11.1*	7.5	24.8	17.6

*The rubber/plastic total is lower than that shown in the detailed table on imports, due to unpublished revisions in data.

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear, 1982 (MA31A)

Preliminary data on market supply for 1983 has been included in a U.S. International Trade Commission report, as noted below, covering nonrubber footwear.

Market Supply of Nonrubber Footwear by Classification
1979-1983

	1983	1982	1981	1980	1979
Total nonrubber footwear supply (thous. pairs)	915,556	813,153	736,418	739,055	794,173
Percent	100.0%	100.0%	100.0%	100.0%	100.0%
Men's, youths', boys', except athletic	23.7	22.5	22.4	22.6	21.6
Women's, misses'	48.3	48.0	49.5	50.3	54.0
Children's, infants'	9.5	8.4	8.4	8.1	7.4
Athletic	11.2	12.5	9.9	8.7	7.4
Other	7.3	8.5	9.9	10.3	9.7

Source: U.S. International Trade Commission based on U.S. Census Bureau reports.

RETAIL TRADE

Consumer Expenditures

Preliminary figures on personal consumption expenditures in 1983 compiled by the U.S. Bureau of Economic Analysis place the value at retail of footwear reaching consumers through any channel at $21,561 million, representing a gain of 6.3% over the 1982 total. Sales through retail outlets in 1982 have been estimated at $17.7 billion, covering 695.9 million pairs, by Footwear Market Index. A total of $18.8 billion is indicated in retail sales for 1983.

Personal Consumption Expenditures For Footwear, 1979-1983
(millions of dollars)

1983	1982	1981	1980	1979
$21,561	$20,276	$19,395	$17,405	$16,291

Source: U.S. Bureau of Economic Analysis

A breakdown of spending by classification is not reported. However, it is estimated that personal consumption expenditures for women's footwear amounted to about $12.7 billion; men's and boys' $8.0 billion; infants'/babies', $900 billion in 1983. Footwear represented about 1.0% of total personal consumption expenditures in 1983 and 1982, down from 1.2% in 1973.

Size of the Consumer Market

Population Projections--1983-2000*

	Number (Thous.)			% Change	Percent Distribution		
	1983	1990	2000	2000/1983	1983	1990	2000
FEMALE							
Total, all ages	120,216	128,234	137,611	+ 14.5%	100.0%	100.0%	100.0%
Under 5 years	8,713	9,369	8,601	- 1.3	7.2	7.3	6.3
5 to 9 years	7,793	9,080	9,157	+ 17.5	6.5	7.1	6.6
10 to 15 years	10,417	9,791	11,419	+ 9.6	8.7	7.6	8.3
16 years & over	93,293	99,994	108,436	+ 16.2	77.6	78.0	78.8
16-19	7,654	6,704	7,373	- 3.7	6.4	5.2	5.4
20-34	30,925	30,774	26,442	- 14.5	25.7	24.0	19.2
35-54	26,458	32,170	40,810	+ 54.2	22.0	25.1	29.6
55 & over	28,256	30,346	33,811	+ 19.7	23.5	23.7	24.6
Median age (years)	32.6	34.3	37.7	+ 17.1			
MALE							
Total, all ages	113,977	121,498	130,379	+ 14.4	100.0	100.0	100.0
Under 5 years	9,133	9,831	9,024	- 1.2	8.0	8.1	6.9
5 to 9 years	8,155	9,519	9,601	+ 17.7	7.1	7.8	7.4
10 to 15 years	10,892	10,240	11,968	+ 9.9	9.6	8.4	9.2
16 years & over	85,797	91,907	99,787	+ 16.3	75.3	75.6	76.5
16-19	7,958	6,999	7,709	- 3.1	7.0	5.8	5.9
20-34	31,162	31,301	27,071	- 13.1	27.3	25.8	20.8
35-54	25,302	31,066	40,002	+ 58.1	22.2	25.5	30.7
55 & over	21,376	22,541	25,005	+ 17.0	18.8	18.5	19.1
Median age (years)	29.6	31.8	34.9	+ 17.9			

(continued)

Size of the Consumer Market

Population Projections--1983-2000*
(continued)

	Number (Thous.)			% Change	Percent Distribution		
	1983	1990	2000	2000/1983	1983	1990	2000
TOTAL, MALE & FEMALE							
Total, all ages	234,193	249,731	267,990	+ 14.4%	100.0%	100.0%	100.0%
Under 5 years	17,846	19,200	17,624	- 1.2	7.6	7.7	6.5
5 to 9 years	15,948	18,599	18,758	+ 17.6	6.8	7.4	7.0
10 to 15 years	21,309	20,030	23,386	+ 9.7	9.1	8.0	8.7
16 years & over	179,090	191,901	208,222	+ 16.3	76.5	76.8	77.7
16-19	15,612	13,703	15,083	- 3.4	6.7	5.5	5.6
20-34	62,087	62,073	53,513	- 13.8	26.5	24.8	20.0
35-54	51,759	63,236	80,812	+ 56.1	22.1	25.3	30.2
55 & over	49,632	52,889	58,814	+ 18.5	21.2	21.2	21.9
Median age (years)	30.9	33.0	36.3				

*Middle series projections (out of three) which assumes a fertility rate of 2.1, or at the replacement level.

NOTE: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Series 25, No. 922
(October 1982)

Consumer Prices

In the six months ending April 1984, the consumer price index for all urban consumers covering footwear was up 1.1% compared with the previous six months. The annual average for 1983 was less than 1% (+0.68%) compared with 1982. Further increases in the rate are expected in view of rising materials costs.

Consumer Price Index For Footwear
Seasonally Adjusted For All Urban Consumers
April 1984, Annual Averages 1982, 1983
(1967 = 100)

	April 1984	Annual Average 1983	Annual Average 1982	% Change 1983/1982
Footwear	208.3	206.9	205.5	+ 0.7%
By type (12/77 = 100)				
Men's	na	133.6	132.0	+ 1.2
Boys', girls'	na	130.9	130.0	+ 0.7
Women's	na	125.6	125.5	+ 0.1

na = not available

Source: U.S. Bureau of Labor Statistics.

RETAIL TRADE

Retail Sales By Type of Outlet

Until findings in the 1982 Census of Retail Trade are released by the U.S. Census Bureau the latest official information on market share by type of outlet is based on the 1977 Census. However, an analysis of the U.S. footwear industry prepared by Business Trend Analysts (BTA) Inc., Commack, N.Y. (Footwear News, June 4, 1984) indicated that shoe stores are losing market share although they still command the largest percent of total footwear sales.

According to this report, the country's 26,000 self-contained shoe stores had footwear sales of $8.4 billion, or 45.6% of the $18.3 billion in retail footwear sales. This compares with a 50.4% share in 1972.

Apparel specialty stores and sporting goods stores have increased their market shares. In 1982, apparel stores were reported to have a 13.1% share of footwear sales, compared with 10.3% in 1972, aided by the growing importance of narrow lines of high-fashion footwear. With the boom in consumer interest in sports and fitness, sporting goods stores garnered a 3.5% share of total footwear sales, according to BTA, up from less than 1% ten years ago.

Department stores and other general merchandise stores declined only slightly, from 35.3% in 1972 to 34% in 1982, according to the report.

Outlet types which have maintained volume while emphasizing price and cutting operating costs by maintaining largely self-service operations--such as the 1,300-unit Volume Shoe and 190-unit Shoe Town--have shown the fastest rate of growth in footwear sales.

Another development cited in this report is the growth of manufacturer-owned retail outlets. In 1980, 21.1% of domestic manufacturers' shipment went to the companies' own retail stores and outlets, compared with 19.2% in 1978. In addition, the growth of giant shoe chains--such as Melville Corporation's 2,000 store Meldisco and 1,200 store Thom McAn divisions--which account for a large share of sales, have fostered close ties between manufacturers and retailers. Only 10% of domestic manufacturers' sales volume is channeled through independent wholesalers; most is shipped directly to the warehouses of large chains.

Leading Markets

According to Sales & Marketing Management Magazine (1983 Survey of Buying Power, Part II, October 31, 1983), the top 10 metropolitan areas accounted for 25% of total retail sales of footwear, which they estimated at $15.9 billion in 1982. The New York metropolitan area lead the list, with a 4.2% share; Chicago was second (3.4%), followed by Los Angeles-Long Beach (3.3%).

RETAIL TRADE

Leading Markets

Footwear Sales in Leading Metropolitan Markets, 1982

Area	(Thous. $)	Rank
New York, N.Y.	$ 672,176	1
Chicago, Ill.	547,437	2
Los Angeles-Long Beach, Calif.	533,152	3
Boston-Lawrence-Salem-Lowell-Brockton, Mass.	526,544	4
Houston, Tex.	350,141	5
Detroit, Mich.	340,329	6
Philadelphia, Pa.	309,584	7
Washington, D.C.	281,827	8
Dallas, Tex.	233,573	9
Nassau-Suffolk, N.Y.	210,737	10
Subtotal	4,005,500	
U.S. total	$15,916,463	

Source: Sales & Marketing Management, October 31, 1983

Shoe Stores

According to the BTA report cited above (Retail Sales By Outlet Type) there were 35,000 self-contained shoe stores plus leased shoe departments in operation in the U.S. in 1982. Shoe stores, alone, were estimated at 26,000. U.S. Bureau of the Census data shows a sharp increase in the share of shoe store sales accounted for by chains. Stores in organizations of 11 or more stores held a 51.4% share of the shoe store total in 1983, up from 41.4% in 1979. Many of these stores are footwear manufacturer-owned.

The latest data on sales by type of shoe store is in the 1977 Census of Retail Trade (U.S. Bureau of the Census). In that year men's shoe stores accounted for 12.1% of shoe store business; women's shoe stores, 23.2%; family shoe stores, 61.1%; children's shoe stores, 2.6%.

Shoe Store Sales, 1980-1983
(Millions of Dollars)

	1983	1982(r)	1981	1980	% Change 1983/82	% Change 1982/81	% Change 1981/80
Shoe store sales, total	$9,266	$8,903	$9,279	$8,307	+ 4.1%	- 4.1%	+11.7%
Chain shoe stores (11 or more store orgs.)	4,761	4,337	3,854	3,457	+ 9.8	+12.5	+11.5
% of shoe store total	51.4%	48.7%	41.5%	41.6%			

(r) revised

Source: U.S. Bureau of the Census.

RETAIL TRADE

Shoe Stores

According to preliminary results in a survey by the National Shoe Retailers Association (NSRA), American shoe stores have suffered a drop in profits in recent years. Preliminary results show pretax net income down 1.2% in 1983, after a 1.3% decline in 1982, even though most stores had sales gains. (*Footwear News*, June 4, 1984)

A decline in profitability was also reported in an industry analysis by Business Trends Analysts, which showed pretax profits of shoe retailers down from 4.4% of sales in 1979-80 to 2.4% in 1982-83. Deterioration in gross margin was cited as the main cause, as retailers held down initial markups and took substantial markdowns to meet competition.

Seasonal Pattern in Sales

Seasonal Patterns in Shoe Store Sales, 1980-1983
Percent of Year's Sales by Months

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1983	6.6	6.1	8.4	8.4	8.1	7.9	7.3	8.7	8.7	8.7	9.0	11.9	100.0
1982(r)	7.4	6.6	8.3	9.1	8.3	7.5	7.5	8.6	8.5	8.4	8.5	11.2	100.0
1981	6.9	5.9	7.5	9.3	8.2	7.8	7.4	8.7	8.5	9.0	8.6	12.1	100.0
1980	7.0	6.0	7.8	8.7	8.1	7.5	7.2	9.0	8.6	9.0	9.3	11.7	100.0

(r) revised

Dates of Easter: 1983-April 3; 1982-April 11; 1981-April 19; 1980-April 6.

Source: Based on U.S. Bureau of the Census,
Monthly Retail Sales & Inventories
(BR-13).

Department Stores

Total Department Store Sales, 1980-1983
(Millions of Dollars)

				% Change		
1983	1982(r)	1981(r)	1980	1983/82	1982/81	1981/80
$116,658	$107,863	$103,926	$ 93,345	+ 8.1%	+ 3.8%	+ 11.3%

(r) revised

Source: U.S. Bureau of the Census,
Current Business Reports
(BR-13-80S)

Department Stores

In the typical department store which had a total volume over $1 million, footwear departments (upstairs store) contributed 4.7% of total store sales in 1982, according to the National Retail Merchants Association. Among stores reporting on women's and misses' shoe departments (upstairs), this department accounted for a median 3.1% of total store sales. Men's footwear accounted for a median 0.9%; juniors' and teens', 0.9%; children's, 0.3%. (Percents do not add to 4.7% as not all stores report on each of the four footwear types. Medians are separately calculated for each shoe type.)

Compared with 1981, footwear sales in the typical department store gained 5.5%. Women's dress and casual shoes had a median increase of 4.4% among reporting stores; men's, up 3.8%.

Department Store Footwear Departments: Selected Operating Ratios, 1982
(Stores With A Total Volume Over $1 Million)
(Median Results -- Upstairs Departments)

	Total All Shoes	Women's & Misses' Dress/Casual Shoes	Juniors' & Teens' Shoes	Men's Footwear	Children's Footwear
(Number reporting)	47	33	29	33	25
Cumulative markon, %	51.3	52.2	51.6	48.7	48.3
Markdowns, % of net sales	19.3	22.1	19.5	14.1	14.7
Gross margin, % of net sales	44.0	43.8	44.9	43.1	43.2
Net sales, % chg. 1982/81	5.5	4.4	10.8	3.8	0.8
Net sales, % of total store	4.7	3.1	0.9	0.7	0.3
Returns, % of gross sales	12.2	13.5	13.5	9.9	nr
$ sales per sq. ft. of selling space	$166.6	$152.6	$228.2	$110.7	$57.9
Stock turns (times)	2.1	2.1	2.5	1.5	1.7

Source: National Retail Merchants Association, Merchandising & Operating Results, (1983 Edition)

Apparel Specialty Stores

The typical women's wear and family apparel store registered a gain of 3.4% in footwear department business in 1983 compared with 1982, according to the National Retail Merchants Association.

In men's wear stores, according to the Menswear Retailers of America, footwear sales registered a typical increase of 1.7% in stores handling men's/boys' wear only, and a decline of 2.0% in stores that also carry women's wear.

RETAIL TRADE

Apparel Specialty Stores

Women's Specialty Stores & Family Clothing Stores: Selected Operating Results For Footwear Departments, 1982

(Total Store Volume Over $1 Million)
(Median Results)

Footwear departments (11*)	
Cumulative markon, %	52.2
Net sales, % of change from 1980	+ 3.4
Net sales, % of total share	8.3
Markdowns, % of net sales	14.7
Gross margin, % of net sales	42.7
Stock turns (times)	1.8

*The number of reporting companies.

Source: National Retail Merchants Association,
Merchandising & Operating Results, (1983 Edition).

Men's Wear Stores: Selected Operating Ratios for Men's & Boys' Shoe Departments, 1982

(Median Results)

	% of Total Store Sales	% Change in Sales 1982/1981	Markdowns % of Men's Shoe Sales	Stock Turns Per Year (times)
Men's & boys' shoes:				
In men's wear stores handling men's wear only	5.8% (34)	+1.7% (27)	14.3% (18)	1.3 (17)
In men's wear stores which also sell women's wear	4.4 (53)	-2.0 (45)	8.7 (33)	1.3 (27)

Note: Figures in parentheses cover the number of reporting firms in each ratio. •

Source: Menswear Retailers of America
Annual Business Survey, June 1982.

ATHLETIC FOOTWEAR MARKET

The U.S. retail market for athletic footwear of all types, valued at over $2 billion, has matured, and the industry can no longer count on the sharp escalation in sales enjoyed in recent years. According to the Census Bureau, apparent consumption of nonrubber athletic footwear represented 11.2% of 1983's total nonrubber footwear consumption, down from 12.5% in 1982.

According to the National Sporting Goods Association, retail sales of athletic footwear reached $2.2 billion in 1983, a 15% gain over 1982. Sales are predicted to soften to a more modest 7% growth rate at the end of 1984, according to NSGA. Much of the increase was due to price increases and to trading up in 1983, as the average price paid for all sport and athletic footwear rose 4% compared with 1983.

ATHLETIC FOOTWEAR MARKET

In terms of pairs, nonrubber athletic footwear consumption (or market supply) was reported at 102.5 million pairs, based on preliminary data for 1983, which represented a gain of less than 1% compared with the 1982 total of 101.6 million pairs.

Based on market tracking studies by Footwear Market Index (FMI), however, total consumer purchases of all types of athletic footwear (including shoes for jogging, tennis, etc.) amounted to 206.4 million pairs, 14.4% over the 1982 total. Preliminary 1983 market projections by this source place total consumption of athletic footwear of the jogging shoe type at 78.4 million pairs, and of tennis shoes/ sneakers at 128.0 million pairs.

The NSGA reported a decline in gym shoe/sneaker sales in 1983 for the second consecutive year. Unit sales of basketball shoes, 35%; jogging/running shoes, 24%. Aerobic shoes, surveyed for the first time, showed unit sales of 1.1 million units, sold at an average retail price of $26.50. There was a pick-up in tennis shoe sales, according to the NSGA. Unit sales were up 13% in 1983 following a 2% decline in 1982. Soccer shoes showed the greatest retail price increase in 1983 at 14.3%, followed by racquetball shoes at 8.9% and jogging/running shoes, 7.1%.

Imports represent nearly 70% of total U.S. supply of athletic footwear of all types, according to trade sources. Domestic manufacturers have been helped in meeting this competition through their ability to speedily fill orders and keep up with a fast-changing, demanding market. They are also importing their own brands.

America's involvement in the Summer Olympics in Los Angeles is expected to stimulate volume somewhat, and interest in running seems to still be at a high level, as evidenced by the great number of entrants in marathon races throughout the U.S. In the active area, the growing aerobics trend is a major factor in women's athletic shoe sales. Basketball shoes are reported as strong in the youth market, possibly at the expense of joggers.

However, a big percentage of athletic footwear is purchased for other than active sports participation. FMI data for 1983 indicate that only 25% of athletic footwear purchased for adults in 1983 was primarily for active sports use; among boys and girls, less than 10% of purchases were for active sports. A natural result has been the development of athleisure footwear, which offers an active look plus wanted fashion features. Consumers have cut back on the use of athletic shoes for casual wear and street active, or athleisure footwear, represents the growth market and is becoming the dominant product among athletic footwear suppliers. This is bringing about changes in distribution patterns.

In the spring of 1984, Nike introduced a new line of athleisure footwear which is to be sold in department and family shoe stores rather than Nike's more traditional channels of distribution. As authentic athletic footwear manufacturers add fashion-oriented styling to their lines and mainstream footwear makers broach the athletic market, the parameters of the athleisure footwear category are becoming harder to identify. Definitions are further blurred as specialty athletic footwear stores--which had previously left this business to department stores--get into the market. This is a natural more on their part, as more and more women are going into the athletic footwear stores to buy aerobic shoes, and can then be exposed to athleisure styles.

ATHLETIC FOOTWEAR MARKET

In another development, some manufacturers of athleisurewear (such as Merona) are broadening their lines to include footwear as well as accessories and activewear, to give a total, head-to-toe look which seems to be preferred now by consumers. The footwear is coordinated in color and design with other apparel and accessories.

The multiplicity of buyers involved in buying the different product categories in the large stores, such as department stores, make the promotion of this concept difficult, however, except in specialty operations where one buyer is involved.

The top 10 manufacturers of athletic footwear, based on 1982 sales, were reported as follows:

	Sales (millions of $)
Nike	$ 650.5
Addidas	225.0
Converse	158.5
Bata	100.0
Puma	100.0
Pony	92.0
Keds	82.0
New Balance	70.0
Etonic (including Tretorn sales)	58.0
Envoys	53.0

Source: SportStyle, May 23, 1983.

BUYING HABITS

Footwear purchases are monitored on a regular basis covering four-month periods by FMI (Footwear Market Index), conducted by Kormos & Associates, Nashville, Tenn. Purchase records for each period, covering footwear for men, women, girls, boys, and infants, are obtained through mailings to three demographically balanced panels of 40,000 households each.

Following are findings on shoe types purchased, place of purchase, etc., based on records filed by consumers nationwide in 1983.

FMI Profile of U.S. Men's Footwear Purchases, 1983

Projected total pairs purchased (millions)	205.4
Percent	100.0%
Percent distribution --	
Styles:	
Dress	29.7
Casual	13.6
Work	12.0
Athletic (jogging shoes, etc.)	16.6
Tennis shoes/sneakers	20.3
Western/casual boots	3.4
Other	4.5

(continued)

FMI Profile of U.S. Men's Footwear Purchases, 1983
(continued)

Sale vs. regular price:	
Sale price	46.6%
Regular price	53.4
Average price paid (regular & sale)	$ 37.19
Percent of reported purchases by region:	
Northeast	21.8%
North Central	24.5
South	33.8
West	19.8
Percent of purchases by outlet type:	
Catalog chain	13.9
Department store	8.8
Discount store	17.5
Shoe store	35.2
Sporting goods store/pro shop	7.4
Mail order	3.4
Apparel specialty store	3.2
Factory outlet	3.2
Other	7.4

FMI Profile of U.S. Women's Footwear Purchases, 1983

Projected total pairs purchased (millions)	419.5
Percent	100.0%
Percent distribution --	
Styles:	
Dress	21.0
Pump	19.3
Casual	27.7
Loafers/moccasins	5.5
Work/duty	2.4
Athletic (jogging shoes, etc.)	7.1
Tennis shoes/sneakers	10.2
Boots	4.8
Other	2.0
Sale vs. regular price:	
Sale price	50.9
Regular price	49.1
Average price paid (regular & sale)	$ 25.13
Percent of reported purchases by region:	
Northeast	22.7%
North Central	25.2
South	34.2
West	17.9

(continued)

FMI Profiles of U.S. Women's Footwear Purchases, 1983
(continued)

Percent of purchases by outlet type:	
Catalog chain	10.7%
Department store	16.3
Discount store	14.3
Shoe store	42.4
Sporting goods store/pro shop	2.1
Mail order	2.9
Apparel specialty store	2.8
Factory outlet	5.3
Other	3.2

FMI Profile of U.S. Boys' & Girls' Footwear Purchases, 1983

	Boys' Footwear	Girls' Footwear
Projected total pairs purchased (millions)	54.3	51.1
Percent	100.0%	100.0%
Percent distribution --		
Styles:		
Dress	14.1	21.8
Casual	7.9	29.0
Work	2.1	0.2
Athletic/jogging	18.4	8.8
Tennis shoe/sneaker	49.7	32.4
Boots	5.9	4.0
Other	1.9	3.8
Sale vs. regular price:		
Sale price	46.2	42.8
Regular price	53.8	57.2
Average price paid (regular & sale)	$ 17.83	$ 15.61
Percent of purchases by outlet type:		
Catalog chain	14.8%	12.3%
Department store	7.4	9.6
Apparel specialty store	1.2	1.3
Discount store	26.7	26.3
Shoe store	37.3	41.7
Sporting goods/pro shop	3.8	0.7
Factory outlet	2.1	3.9
Other	6.7	4.2

Source: Kormos & Associates, Nashville, Tenn., Footwear Market Index

BUYING HABITS

Teenage Girls

Every two years Seventeen Magazine conducts a survey among a cross-section of teenagers who are members of their Consumer Panels on fall/winter wardrobes--particularly purchases for going back to school.

The most recent survey was conducted in September 1982. Findings represented a nationwide total of 8,655,000 teenage-female students; projected spending for footwear: $1,004,756,000. 93% of the girls had purchased shoes, 31.9% had purchased boots for back-to-school wear.

Back-To-School Footwear Purchases by Teenage Girls

	No. of Pairs	Expenditures
Projected total (thousands)	31,315	$1,004,756
Percent	100.0%	100.0%
Types of footwear purchased:		
Casuals	25.7	22.6
Dress	20.0	19.7
Sandals/thongs	7.7	4.4
Clogs	2.7	2.3
Jogging shoes	10.3	9.7
Tennis shoes	9.5	8.5
Formal evening	3.1	3.6
Moccasin-type shoes	5.5	4.3
Slippers	2.1	0.8
Boots	12.6	23.4
Other	0.8	0.6

Source: Seventeen's Back-To-School Study, 1983

A Spring Apparel Buying Study was conducted by Seventeen in May 1983, among a cross-section of girls who are members of their Consumer Panel. Projected results showed a total of $1.7 billion spent by teenage girls for footwear, representing 13% of total spring wardrobe expenditures.

Findings on usual place of purchase for footwear, and usual method of payment by the teenage girls were reported as follows:

Usual place of purchase of footwear:	% of girls
Shoe store	81.4%
Department store	20.1
Specialty store	7.0
Discount store	3.8
Mail order	2.0
Other	3.1

(continued)

BUYING HABITS

Teenage Girls

Usual Method of Payment by Teenage Girls For Footwear

Total expenditures	100.0%*
Methods of payment:	
Out of earnings/allowance	45.5
Extra cash from parents	28.1
Parents' charge accounts	28.0
Personal charge accounts	3.0
Other	5.1

* Adds to more than 100% due to multiple responses.

Source: Seventeen's 1983 Spring Apparel Study

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COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

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DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

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SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label. (September)

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WOMEN'S, MISSES' & JUNIORS' SPORTSWEAR, CASUAL WEAR, SEPARATES & JEANS

Market Trends

According to the management consulting firm, Kurt Salmon Associates, unit sales of women's wear gained 6% in the twelve month period ended September 1983 compared with the previous twelve months. As the U.S. economy continues its revitalization into 1984, this same firm projects a total 6.5% rise in women's wear, fueled by unit sales of women's sportswear. In the year ended September 1984, non-tailored outerwear (principally activewear) is expected to increase 12%, more than any other women's wear category, on the heels of a 28% gain in the category for the period ended September 1983.

Even more so than in the past, the popularity of an active look combined with fashion constitutes the primary impetus for sportswear sales. The growing emphasis on fashion and designers is particularly noted in the activewear field. In many instances the only difference between authentic activewear and fashion-oriented activewear, dubbed "streetwear," is the amount of functional detailing on the former. Retailers report that while sales of traditional bodywear are as strong as ever, the biggest growth area is in new fashion pieces, for example, the blouson style. The active look has become so pervasive that fabrics associated only with activewear in the past, such as fleece, are increasingly being used in women's traditional sportswear.

Women's jeans is another category which is looking toward fashion for continued growth. As sales of basic five-pocket jeans have weakened over the past year, some of the slack has been taken up by novelty fashion looks, chiefly striped, checked, stonewashed and distressed denim. Analysts believe that the aging of the "baby boom" generation, the heaviest jeans-wearing group, has caused this decline. This age group is now more inclined to wear casual pants in a wide range of styles and fabrications rather than jeans as they search for a new look. A recent report from a major jeans manufacturer forecasts little change in jeans sales following moderate unit increases for 1984.

GENERAL INDUSTRY STATISTICS

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census. Results of the most recent census, covering the year 1982, will be available in mid-to-late 1984. During intercensal periods, the Bureau conducts annual surveys using a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity.

According to the 1981 annual survey, the value of shipments in the women's, misses' and juniors' blouses and shirts industry (including primary and secondary products as well as miscellaneous receipts) rose 11.5% to an estimated $3.0 billion compared with 1980. The estimated 1981 value of shipments in the women's, misses' and juniors' outerwear, not elsewhere classified was $4.6 billion, 14.7% higher than in 1980.

GENERAL INDUSTRY STATISTICS

Women's, Misses' & Juniors' Blouse Industry (SIC 2331*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments, total**	1,345	1,441	1,502	- 6.7%
With 20 or more employees	874	928	955	- 5.8
Employees, total (thous.)	81.9	84.1	85.1	- 2.6
Production workers (thous.)	70.6	72.6	73.9	- 2.7
Payroll (mil. $)	$ 761.9	$ 716.6	$ 689.2	+ 6.3
Value added by manufacture, (mil. $)#	1,557.0	1,418.9	1,383.5	+ 9.7
Value of industry shipments, (mil. $)##	3,026.8	2,715.5	2,673.1	+ 11.5
Capital expenditures, new (mil. $)	36.8	34.3	32.8	+ 7.3

Women's, Misses' & Juniors' Outerwear, n.e.c. (SIC 2339*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments, total**	1,487	1,585	1,610	- 6.2%
With 20 or more employees	982	1,043	1,036	- 5.8
Employees, total (thous.)	117.5	117.9	109.4	- 0.3
Production workers (thous.)	99.6	102.6	94.6	- 2.9
Payroll (mil. $)	$1,000.9	$ 960.0	$ 827.4	+ 4.3
Value added by manufacture, (mil. $)#	2,418.0	2,004.4	1,679.9	+ 20.6
Value of industry shipments, (mil. $)##	4,582.2	3,994.3	3,399.6	+ 14.7
Capital expenditures, new (mil. $)	50.1	52.4	44.9	- 4.4

Knit Outerwear Mills (SIC 2253*)

	1981	1980	1979	% Change 1981/1980
Number of companies	na	na	na	--
Number of establishments, total**	820	876	884	+ 6.4%
With 20 or more employees	442	473	459	- 6.5
Employees, total (thous.)	64.7	67.1	61.9	- 3.6
Production workers (thous.)	55.3	57.9	53.4	- 4.5
Payroll (mil. $)	$ 682.3	$ 637.4	$ 548.1	+ 7.0
Value added by manufacture, (mil. $)#	1,440.7	1,339.1	1,096.0	+ 7.6
Value of industry shipments, (mil. $)##	2,807.8	2,571.7	2,220.8	+ 9.2
Capital expenditures, new (mil. $)	50.0	48.5	35.6	+ 3.1

na = not available
n.e.c. = not elsewhere classified

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2331 comprises establishments primarily engaged in the manufacturing of women's, misses' and juniors' blouses, waists and shirts.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

SIC 2339 includes manufacturing establishments primarily engaged in the manufacture of women's, misses' and juniors' outerwear, not elsewhere classified, such as neckwear, swimwear, slacks, ski suits, sweaters, and outerwear sport shirts, cut and sewn from purchased woven or knit fabric, also washable service apparel.

SIC 2253 includes establishments making knit outerwear for men and boys, as well as women and children. Separate figures not available as most mills produce for men, women and children.

NOTE: Industry data on manufacturers of women's skirts, pants, pantsuits and jackets is combined in SIC 2337 with data on manufacturers of women's coats and suits. This SIC is covered in the Women's Coats and Suits Fact File.

**Each business location is counted as a separate establishment. Data on number of establishments includes those with paid employees only, as reported in County Business Patterns.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made for or by each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of primary product shipments alone, plus the value of shipments by manufacturers classified in other industries, is covered on pages

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1979, 1980, 1981.

Between 1972 and 1983, the value of shipments in the women's, misses' and juniors' blouse and shirt industry rose at a compound annual growth rate of 2.3%, as measured in current dollars by the Bureau of Industrial Economics. But the Bureau reports that on a constant 1972 dollar basis, the rate actually decreased 3.5% annually.

Estimated 1983 industry shipments increased 1.3% over 1982 to $3.4 billion, according to this source.

GENERAL INDUSTRY STATISTICS

Estimated Value of Industry Shipments in the Women's, Misses' & Juniors' Blouse & Shirt Industry, 1982, 1983

	Value of Industry Shipments (Mil. $) 1983(e)	Value of Industry Shipments (Mil. $) 1982(e)	% Change 1983/1982	% Change in Constant (1972)$ 1983/1982
Women's, misses' & juniors' blouses & shirts (SIC 2331)	$3,405.0	$3,361.5	+ 1.3%	- 3.6%

Source: Bureau of Industrial Economics, U.S. Industrial Outlook 1984.

In 1983, 549 establishments with at least 20 employees were primarily engaged in the manufacture of women's, misses' and juniors' blouses and shirts. Industry shipments from these establishments were an estimated $3.0 billion, according to Sales & Marketing Management's "Survey of Industrial & Commercial Buying Power".

More than 300 establishments classified in the women's, misses' and juniors' outerwear (not elsewhere classified) industry employ more than 100 persons and account for 68% of the nearly $4.7 billion value of shipments from establishments with 20 or more employees in 1983.

Value of Shipments & Number of Manufacturing Establishments in Specified Women's Sportswear & Separates Industries, 1983

	Number of Establishments		Industry Shipments (Mil. $)	% of Shipments From Plants With 100+ Employees
	With 20+ Employees	With 100+ Employees		
Women's, misses'& juniors' blouse industry (SIC 2331)	549	174	$2,979.1	64
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339)	917	307	4,677.2	68
Knit outerwear mills (SIC 2253)	487	186	2,936.5	78

n.e.c. = not elsewhere classified.

Source: Sales & Marketing Management
Survey of Industrial & Commercial Buying Power
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GENERAL INDUSTRY STATISTICS

Employment & Earnings

During the first quarter of 1984, there were an average of 60.7 thousand persons employed in the women's blouse industry, 1.5% fewer than in the first quarter of 1983. Over the same time period, employment in the women's outerwear, not elsewhere classified, industry gained 6.3% and rose 2.4% in knit outerwear mills.

In all three industries, average weekly pay for production workers increased at a faster rate than employment. Weekly earnings of production workers in the women's blouse industry were 4.5% higher in 1984's first quarter than a year ago. On average, production workers in the women's outerwear, n.e.c. category earned 5.7% more than a year ago and knit outerwear mills production personnel earned 8.5% more.

Employment & Earnings in Selected Women's Sportswear & Separates Industries

	January-April Average		% Change	Annual Average		% Change
	1984	1983	1984/83	1983	1982	1983/82
Women's, misses' & juniors' blouses (SIC 2331):						
All employees (thous.)	60.7	61.6	- 1.5%	62.7	61.8	+ 1.5%
Production workers (thous.)	52.0	52.5	- 0.9	53.3	53.0	+ 0.6
Average weekly earnings	$174.59	$167.00	+ 4.5	$170.38	$162.66	+ 4.7
Average hourly earnings	5.02	4.90	+ 2.4	4.91	4.77	+ 2.9
Average weekly hours	34.8	34.1	+ 2.0	34.7	36.4	- 4.7
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339):						
All employees (thous.)	152.6	143.5	+ 6.3	140.2	138.8	+ 1.0
Production workers (thous.)	128.6	119.6	+ 7.5	117.1	116.2	+ 0.8
Average weekly earnings	$191.14	$180.79	+ 5.7	$181.86	$167.15	+ 8.8
Average hourly earnings	5.21	4.98	+ 4.6	5.08	4.96	+ 2.4
Average weekly hours	36.7	35.5	+ 3.4	35.8	34.1	+ 5.0
Knit outerwear mills (SIC 2253):						
All employees (thous.)	62.8	61.3	+ 2.4	63.6	65.6	- 3.0
Production workers (thous.)	53.9	51.8	+ 4.0	54.3	55.7	- 2.5
Average weekly earnings	$210.65	$194.22	+ 8.5	$204.79	$191.46	+ 7.0
Average hourly earnings	5.61	5.39	+ 4.1	5.52	5.26	+ 4.9
Average weekly hours	37.7	35.8	+ 5.3	37.1	33.7	+10.1

n.e.c. = not elsewhere classified.

Source: U.S. Bureau of Labor Statistics
Employment & Earnings.

GENERAL INDUSTRY STATISTICS

Concentration in Manufacturing

The Women's Sportswear & Separates Industry by Employment Size, 1981

	Establishments		Employees		Annual Payroll	
	Number	% of total	Number (Thous.)	% of total	Mil. $	% of total
Women's, misses' & juniors' blouses (SIC 2331) total	1,345	100.0%	79.8	100.0%	$732.8	100.0%
By establishment size:						
Under 10 employees	271	20.1	1.3	1.6	22.4	3.1
10 to 19 employees	200	14.9	3.3	4.1	35.9	4.9
20 to 49 employees	378	28.1	13.9	17.4	132.9	18.1
50 to 99 employees	289	21.5	21.7	27.2	185.5	25.3
100 or more employees	207	15.4	39.6	49.6	356.1	48.6
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339) total	1,487	100.0%	$101.3	100.0%	$974.3	100.0%
By establishment size:						
Under 10 employees	292	19.6	(D)	--	(D)	--
10 to 19 employees	213	14.3	3.6	3.6	37.2	3.8
20 to 49 employees	431	29.0	15.9	15.7	138.3	14.2
50 to 99 employees	282	19.0	21.1	20.8	191.1	19.6
100 or more employees	269	18.1	(D)	--	(D)	--
Knit outerwear mills (SIC 2253) total	820	100.0%	$ 62.1	100.0%	$698.4	100.0%
By establishment size:						
Under 10 employees	234	28.5	1.1	1.8	24.2	3.5
10 to 19 employees	144	17.6	2.2	3.5	29.4	4.2
20 to 49 employees	211	25.7	7.3	11.8	78.0	11.2
50 to 99 employees	105	12.8	7.6	12.2	76.5	11.0
100 or more employees	126	15.4	43.8	70.5	490.2	70.2

D = Withheld to avoid disclosure.
n.e.c. = not elsewhere classified.

Source: U.S. Bureau of the Census,
County Business Patterns, 1981.

Manufacturing plants in four states accounted for 65.8% of the total value of shipments in the women's, misses' and juniors' blouse industry in 1978, the latest year for which data has been published. Plants in New York State produced the largest amount of industry shipments, not only in the blouse industry, but also in the outerwear, n.e.c. category and knit outerwear mills industry in 1978.

GENERAL INDUSTRY STATISTICS

Concentration in Manufacturing

Women's, Misses' & Juniors' Sportswear & Separates Industries
By Leading States, 1978

	Number of Employees (Thous.)	Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
Women's, misses' & juniors' blouses (SIC 2331)			
U.S. total	73.0	$ 1,202.8	$ 2,333.3
Leading states:			
New York	16.6	238.9	559.2
Pennsylvania	12.1	252.6	449.2
Virginia	7.5	174.4	279.4
North Carolina	8.6	116.4	248.2
Leading states, total	44.8	782.3	1,536.0
% of U.S. total	61.4%	65.0%	65.8%
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339)			
U.S. total	106.4	$ 1,855.0	$ 3,573.1
Leading states:			
New York	23.9	535.4	1,094.9
California	17.5	363.5	699.3
Pennsylvania	8.7	99.4	169.4
North Carolina	5.1	88.4	194.0
Leading states, total	55.2	1,086.7	2,157.6
% of U.S. total	51.9%	58.6%	60.4%
Knit outerwear mills (SIC 2253)			
U.S. total	78.8	1,410.6	2,613.2
Leading states:			
New York	9.5	347.6	715.6
California	10.4	280.9	620.3
Pennsylvania	20.1	270.5	412.4
Virginia	4.1	67.2	98.0
Leading states, total	44.1	966.2	1,846.3
% of U.S. total	56.0%	68.5%	70.6%

n.e.c. = not elsewhere classified.

Source: Based on U.S. Bureau of the Census, Annual Survey of Manufactures, 1978.

PRODUCTION

Annual production figures for women's wear for the year 1983 will be released by the Census Bureau in August. Because of the addition of firms reporting to the Bureau in 1982 for the first time, data for 1981 cannot be compared directly with later years, and only 1982 figures are shown below.

Production of Specified Types of Women's, Misses', Junior Wear, 1982

	Unit of Measure	1982
Women's, misses', junior		
Blouses, shirts, tops		
Knit, incl. sweat shirts	thous. doz.	9,198
Blouses, tops, etc., woven	thous. units	27,845
Skirts	" "	104,430
Jackets	" "	37,249
Vests	" "	2,456
Slacks	thous. doz.	254,973
Sweaters	" "	7,135
Outerwear, not elsewhere classified	" "	4,500

Source: U.S. Bureau of the Census,
Current Industrial Reports (MA23F(82)-1)

Activewear

Production of Women's, Misses' & Juniors' Activewear, 1982

	1982 Production (Thous. Units)	% Change 1982/1981
Athletic shorts, including jogging shorts, tennis shorts, tennis skirts, etc.	1,041	+ 34.6%
Warm-up or jogging suits	1,190	+ 15.3
Swimsuits	3,060	+ 2.3
Woven fabrics	443	na
Knit fabrics	2,043	na
Construction, n.s.k.	574	na
Ski jackets, including ski vests	62	- 40.2
Ski pants	14	+100.0

na = not available
n.s.k. = not specified by kind
* Adjusted for comparability to include firms not reporting in 1981.

Source: U.S. Bureau of the Census,
Women's and Children's Outerwear, MA23F(82)-1

Preliminary estimates on 1983 production of specified types of women's wear have been compiled by the National Cotton Council, and are summarized with a comparison of 1982 figures from this source in the following table.

PRODUCTION

Production of Specified Women's, Misses' & Juniors' Sportswear
By All U.S. Producers, 1983
(In Thousand Dozens)

	1983(p)	% Change 1983/1982
Blouses & shirts	41,409	+ 10.1%
Knit	19,155	+ 12.6
Dress & sport	18,411	+ 12.0
Sweat	744	+ 30.1
Woven	22,254	+ 8.0
Nontailored outer jackets	158	- 10.2
Knit, including fake fur	71	- 10.1
Woven	87	- 10.3
Vests, excluding sweater vests	210	+ 1.0
Knit	139	+ 0.7
Woven	71	+ 1.4
Slacks & non-denim jeans & pants	14,750	+ 8.0
Knit	4,130	+ 0.8
Woven	10,620	+ 11.1
Jeans & dungarees, denim only, woven	8,577	+ 13.0
Shorts & other playgarments, total	2,206	+ 11.2
Knit	1,118	+ 4.1
Shorts, excluding jogging shorts, tennis shorts, etc.	754	+ 6.2
Playsuits, beachtops, halters, etc.	364	--
Woven	1,088	+ 19.6
Shorts, excluding jogging shorts, tennis shorts, etc.	894	+ 24.9
Playsuits, beachtops, halters, etc.	194	--
Active sportswear:		
Warm-up or jogging suits, knit	1,488	+ 25.0
Swimsuits	3,121	--

(p) preliminary

Source: National Cotton Council of America, *Cotton Counts Its Customers*, 1984 Edition

PRODUCTION

By Fabric/Construction

The percent distribution of 1982 and 1981 cuttings of women's sportswear by type of fabric and construction is covered in the following table.

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric, Construction & Price Line, 1981, 1982

	1982	1981
Separate tailored suit-type jackets	100.0%	100.0%
By construction:		
Woven fabric	55.9	59.1
Knit fabric	31.4	34.6
Not specified	12.6	6.2
By fabric:		
All cotton & chiefly cotton	8.7	10.4
All man-made & chiefly man-made	65.1	65.6
All wool and chiefly wool	14.4	17.6
Other fabric	0.8	0.9
Not specified	11.1	5.5
Nontailored outer jackets, excluding ski	100.0	100.0
By construction:		
Woven fabric	47.4	49.8
Knit fabric }	52.6	50.2
Not specified }		
By fabric:		
All cotton & chiefly cotton	na	na
All man-made & chiefly man-made	56.9	56.2
All wool & chiefly wool	25.8	14.6
Other fabric	17.3	29.2
Not specified		
Vests, including sweater vests	100.0	100.0
By construction:		
Woven fabric	30.3	25.3
Knit fabric }	62.0	63.8
Not specified }	7.6	10.9
By fabric:		
All cotton & chiefly cotton	18.5	13.7
All man-made & chiefly man-made	62.7	64.0
All wool & chiefly wool }	11.8	12.6
Other fabric }		
Not specified	7.0	9.7

(continued)

PRODUCTION

By Fabric Construction

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric, Construction & Price Line, 1981, 1982
(continued)

	1982	1981
Blouses & shirts, except knit outerwear sport shirts (thous. dozen)	100.0%	100.0%
By price (per dozen):		
Under $23.00	2.8	3.2
$23.00 to $38.99	8.1	6.5
$39.00 to $59.99	15.1	17.4
$60.00 & over	58.0	64.1
Not specified	16.0	8.8
By fabric:		
Woven fabric:		
All cotton & chiefly cotton	14.6	13.8
All man-made & chiefly man-made	43.6	47.3
All wool & chiefly wool Other fabric	3.4	3.1
Knit fabric:		
All cotton & chiefly cotton	4.7	4.7
All man-made & chiefly man-made	16.4	20.9
All wool & chiefly wool Other fabric	0.7	1.3
Not specified	16.6	8.9
Knit outerwear sport shirts, except sweater shirts (thous. dozen)	100.0	100.0
All cotton & chiefly cotton	21.1	24.3
All man-made & chiefly man-made	50.0	66.6
All wool & chiefly wool Other fabric	0.5	0.8
Not specified	28.4	8.3
Pullover sweaters (thous. dozen)	100.0	100.0
All cotton & chiefly cotton	18.5	13.4
All man-made & chiefly man-made	62.0	68.4
All wool & chiefly wool	8.8	9.1
Not specified	10.7	9.1
Coat & cardigan sweaters (thous. dozen)	100.0	100.0
All cotton & chiefly cotton	2.1	2.4
All man-made & chiefly man-made	68.9	71.4
All wool & chiefly wool	3.8	4.9
Not specified	25.1	21.3

(continued)

PRODUCTION

By Fabric/Construction

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric, Construction & Price Line, 1981, 1982

(continued)

	1982	1981
Skirts	100.0%	100.0%
By construction:		
Woven fabric	59.7	62.4
Knit fabric	24.0	29.2
Not specified	16.2	8.4
By fabric:		
All cotton & chiefly cotton	14.7	15.4
All man-made & chiefly man-made	57.0	61.8
All wool & chiefly wool	13.0	13.8
Other fabric	1.5	0.9
Not specified	13.8	8.1
Slacks, except dungarees & jeans	100.0	100.0
By construction:		
Woven fabric	60.8	65.8
Knit fabric	28.5	29.1
Not specified	10.6	5.1
By fabric:		
All cotton & chiefly cotton	16.7	15.2
All man-made & chiefly man-made	65.8	72.7
All wool & chiefly wool	6.0	5.4
Other fabric	1.0	1.4
Not specified	10.5	5.3
Jeans & dungarees	100.0	100.0
All cotton & chiefly cotton	85.4	87.9
All man-made & chiefly man-made	11.7	11.1
Not specified	2.9	0.9
Shorts, excluding jogging & tennis	100.0	100.0
By construction:		
Woven fabric	43.6	42.5
Knit fabric	43.2	50.5
Not specified	13.2	7.0
By fabric:		
All cotton & chiefly cotton	45.8	44.3
All man-made & chiefly man-made	40.7	48.7
Other fabric	13.5	7.0

PRODUCTION

By Fabric/Construction

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric, Construction & Price Line, 1981, 1982
(continued)

	1982	1981
Playsuits, beach tops, halters & other playwear	100.0	100.0
By construction:		
Woven fabric	26.2	33.8
Knit fabric	49.3	49.1
Not specified	24.5	17.0
By fabric:		
All cotton & chiefly cotton	19.9	19.0
All man-made & chiefly man-made	45.9	55.5
Other fabric Not specified	34.2	25.5

na = not available

Source: U.S. Bureau of the Census, Current Industrial Reports
Women's & Children's Outerwear, MA-23F(82)-1.

PRODUCTION

Seasonality of Production

The following table shows the 1983 distribution of production by months in specified types of women's, misses' & juniors' sportswear, as reported in the Census Bureau's monthly survey.

Monthly Distribution of Reported Cuttings of Selected Women's Sportswear, 1983

	Tailored Separate Jackets	Skirts	Slacks*	Blouses	Knit Outerwear Sport Shirts	Sweaters**
Total Year	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	7.9	8.0	8.7	7.0	9.2	7.2
February	7.7	7.8	9.4	8.0	10.6	6.6
March	8.7	9.1	9.4	8.4	10.8	6.6
April	7.8	7.9	8.6	8.0	8.5	5.8
May	7.6	8.2	8.7	8.9	8.0	6.2
June	8.3	8.6	8.8	9.6	7.3	8.3
July	7.2	7.9	7.7	7.7	5.5	9.2
August	9.7	9.7	8.7	8.8	7.3	10.4
September	9.5	9.0	8.5	8.7	7.6	10.1
October	10.0	8.6	7.7	9.4	8.3	10.3
November	7.9	7.9	7.5	8.2	8.9	10.6
December	7.8	7.3	6.3	7.4	8.0	8.6

* Includes jeans and dungarees, and jean-cut casual slacks
**Shipments.

Source: U.S. Bureau of the Census, Current Industrial Reports
Men's, Women's, Misses' & Juniors' Selected Apparel
M23I(84)-1.

SHIPMENTS

Information on value of shipments of women's wear in 1983 is not available. U.S. Census Bureau data currently available indicates that the value of shipments of women's blouses and shirts, except knit outerwear sport shirts, in 1982 was off a slight 0.4% compared with the year before. The value of shipments of women's slacks, excluding jeans and dungarees, rose 3.2% while shipments of women's jeans and dungarees decreased 7.9% in value.

With the exception of women's ski jackets, which fell 14.8%, the value of shipments of women's active sportswear items increased at a rapid pace in 1982. For example, athletic shorts were up 18.5%, warm-up suits rose 9.9% and ski pants increased a hefty 79.3%

Value of Shipments of Reported Women's, Misses' & Juniors' Sportswear & Separates Categories, 1982

	Value of Shipments (Mil. $)	Adjusted % Change 1982/1981
Tops:		
Blouses & shirts, except knit outerwear sport shirts	2,562.4	- 0.4%
Knit outerwear sport shirts	610.5	- 3.5
Sweaters	482.1	- 0.6
Pullovers	370.2	na
Cardigans & coat-type	73.4	na
Separate tailored suit-type jackets	836.1	- 0.8
Nontailored outer jackets, exc. ski jackets	74.0	+ 5.0
Vests, exc. sweater vests	25.5	+ 5.0
Bottoms:		
Skirts	1,247.5	+ 3.9
Slacks, exc. jeans & dungarees	1,667.6	+ 3.2
Jeans & dungarees	1,002.4	- 7.9
Active Sportswear:		
Athletic shorts, exc. jogging shorts, tennis shorts, tennis skirts, etc.	60.2	+18.5
Warm-up or jogging suits	89.0	+ 9.9
Swimsuits	394.6	+ 5.8
Ski jackets	32.4	-14.8
Ski pants	5.4	+79.3
Playgarments:		
Shorts, exc. tennis & jogging	68.2	+ 7.5
Playsuits, beach tops, halters, & other playwear	40.5	+15.5
Team sports uniforms	16.1	na

na = not available

Source: U.S. Bureau of the Census
Current Industrial Reports,
Women's & Children's Outerwear MA-23F(82)-1.

Leading U.S. Manufacturers of Specified Active Sportswear, 1982
(Including both men's & women's wear)

Tennis & Golf Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Robert Bruce	$ 60.0
Munsingwear	40.0
Jockey	33.0
Loomtogs/Fred Perry	23.5
Difini	16.0
Fila*	15.0
Newcombe Active Sportswear	12.5(e)

General Activewear

Leading Manufacturers	1982 Sales (Mil. $)
Izod	$ 450.0(e)
Bassett-Walker	240.0(e)
Tultex	231.4
Sale Knitting	210.0(e)
Jantzen	165.0(e)
Ocean Pacific	144.0
Catalina	105.0(e)

Ski Apparel

Leading Maufacturers	1982 Sales (Mil. $)
Head**	$ 34.0(e)
Sport-Obermeyer	20.0
CB Sports	16.5
Roffe	13.0(e)
Skyr	10.1

Outdoor Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Woolrich	$ 106.6
Pacific Trail	63.1
Jan Sport	28.0
The North Face	22.0
Patagonia	15.0(e)

Bodywear/Exercise Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Danskin	$ 100.0(e)
Flexatard	22.0
Carushka	13.0
West Grove	9.0(e)

Athletic Footwear Apparel

Leading Manufacturers	1982 Sales (Mil. $)
Adidas	$ 140.0(e)
Nike	96.9
Etonic	8.0(e)
New Balance	8.0(e)

Competitive Runningwear

Leading Manufacturers	1982 Sales (Mil. $)
Dolfin	$ 12.5
Sub-4	8.0
Bill Rodgers & Co.	6.5
Frank Shorter	3.1
Women on the Run	3.0

Competitive Swimwear

Leading Manufacturers	1982 Sales (Mil. $)
Speedo	30.0
Arena	10.0
The Finals	3.2(e)
Hind Wells	2.5
Ocean Pool	1.5(e)
Gulbenkian	1.5(e)

(e) = estimated
* Also includes skiwear & swimwear
**Also includes Head swimwear, tenniswear, runningwear & Tyrolia skiwear.

Source: SportStyle May 23, 1983

PRODUCER PRICE INDEXES

While the producer price index covering all apparel went up only 2.3% between March 1983 and March 1984, factory prices of women's separates increased at a higher rate. A prime example is women's blouses and shirts, which showed a 9.1% rise in manufacturer's prices over this twelve-month period. Similarly, skirt prices climbed 5.6%.

Producer (Factory) Price Indexes for Selected Types of Women's Sportswear & Separates, December, March 1984/1983
(1967 = 100 unless otherwise specified)

	March		December		% Change
	1984(p)	1983	1984	1983	March 1984/1983
All commodities	311.1	300.6	306.0	300.6	+ 3.5%
All apparel	200.7	196.1	198.4	191.7	+ 2.3
Women's apparel	179.8	175.3	177.8	169.1	+ 2.6
Skirts, including uniform (12/77 = 100)	126.4	119.7	125.3	117.1	+ 5.6
Slacks (6/83 = 100)	95.1	na	98.8	na	--
Blouses & shirts, except knit, sport & sweat shirts (12/77 = 100)	143.6	131.6	136.3	na	+ 9.1
Separate tailored suit-type jackets (12/77 = 100)	115.0	116.1	115.0	na	- 0.9

na = not available

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports

Imports of women's, misses' and juniors' blouses and shirts grew at a compound annual rate of 19.1% between 1972 and 1983 to a value of $1.5 billion, according to the U.S. Bureau of Industrial Economics. In units, imports accounted for approximately 27% of apparent consumption (domestic production plus imports minus exports) of blouses and shirts in 1983.

The U.S. foreign trade deficit in apparel continued to widen in 1983. For every dollars worth of apparel exported in 1983, nearly $14 dollars worth was imported. Women's and children's sportswear imports were valued at $3.4 billion, a 24.6% increase over the 1982 value. The quantity imported rose 20.4% to more than 67 million dozen.

FOREIGN TRADE

Imports

Summary of U.S. Imports of Women's & Children's Sportswear & Separates, 1982, 1983

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Total, all reported categories	67,460.5	56,037.3	+ 20.4%	$3,359,292	$2,696,958	+ 24.6%
Blouses & shirts, total	34,903.4	29,164.3	+ 19.7	1,485,965	1,174,985	+ 26.5
Blouses	16,037.4	12,840.5	+ 24.9	898,476	721,185	+ 24.6
Not knit	15,480.9	12,419.7	+ 24.7	852,121	688,438	+ 23.8
Cotton	8,566.9	6,851.8	+ 25.0	396,497	330,731	+ 19.9
Wool or man-made	6,415.8	5,243.8	+ 22.4	367,715	292,906	+ 25.5
Silk	498.2	324.1	+ 53.7	87,909	64,846	+ 36.5
Knit, wool	556.5	420.8	+ 32.2	46,355	32,702	+ 41.7
Shirts, knit						
Cotton or man-made	18,866.0	15,903.0	+ 18.6	587,489	453,800	+ 29.5
Sweaters, knit	11,440.7	9,768.1	+ 17.1	721,959	613,539	+ 17.7
Cashmere, wholly or part	55.9	39.0	+ 43.3	21,577	15,932	+ 35.4
Sheep-like hair	164.8	130.9	+ 25.9	21,589	15,338	+ 40.8
Wool	1,663.6	1,386.4	+ 20.0	164,502	134,787	+ 22.0
Man-made	8,895.7	7,601.1	+ 17.0	448,441	393,753	+ 13.9
Cotton	660.7	610.7	+ 8.2	65,850	53,729	+ 22.6
Pants, slacks & shorts	16,874.5	13,695.4	+ 23.2	911,593	727,061	+ 25.4
Not knit						
Cotton	11,486.7	7,753.9	+ 48.1	665,403	490,754	+ 35.6
Wool	173.8	117.5	+ 47.9	32,109	21,358	+ 50.3
Man-made	5,151.9	5,761.9	- 10.6	203,998	204,914	- 0.4
Silk	62.1	62.1	--	10,083	10,035	+ 0.5
Skirts	3,036.3	1,943.8	+ 56.2	205,597	140,346	+ 46.5
Not knit	2,574.1	1,654.6	+ 55.6	185,204	124,310	+ 49.0
Wool	212.2	109.4	+ 94.0	35,365	22,458	+ 57.5
Man-made	821.7	381.9	+115.1	55,888	27,308	+104.7
Cotton	1,540.2	1,163.3	+ 32.4	93,951	74,544	+ 26.0
Knit	462.2	289.2	+ 59.8	20,393	16,036	+ 27.2
Wool	31.0	21.7	+ 42.9	5,140	3,523	+ 45.9
Cotton or man-made	431.2	267.5	+ 61.2	15,253	12,513	+ 21.9
Playsuits						
Not knit						
Cotton	1,205.6	1,465.7	- 17.7	34,178	40,977	- 16.6

*The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census, U.S. General Imports, FT 135, December 1982, 1983.

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear & Separates by Leading Country of Origin, 1982, 1983

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Blouses, cotton, not knit total	8,566.9	6,851.8	+ 25.0%	$396,497	$330,731	+ 19.9%
India	2,624.6	1,801.6	+ 45.7	103,401	74,363	+ 39.0
Hong Kong	2,524.2	2,495.0	+ 1.2	142,969	144,586	- 1.1
Mainland China	670.3	471.9	+ 42.0	25,214	17,008	+ 48.2
Blouses, wool or man-made not knit, total	6,415.8	5,243.8	+ 22.4	367,715	292,906	+ 25.5
Mainland China	1,212.6	956.8	+ 26.7	52,182	36,008	+ 44.9
Korea	1,041.2	992.0	+ 5.0	65,924	56,523	+ 16.6
Hong Kong	861.1	660.4	+ 30.4	66,181	55,244	+ 19.8
Blouses, silk, not knit total	498.2	324.1	+ 53.7	87,909	64,846	+ 35.6
Hong Kong	336.2	221.9	+ 51.5	53,279	39,379	+ 35.3
Korea	66.6	55.0	+ 21.1	14,279	11,551	+ 23.6
Mainland China	62.2	19.9	+212.6	6,897	2,390	+188.6
Blouses, wool, knit, total	556.5	420.8	+ 32.2	46,355	32,702	+ 41.7
Hong Kong	497.6	387.2	+ 28.5	42,250	30,148	+ 40.1
Mainland China	21.7	5.0	+334.0	947	249	+280.3
Korea	20.8	16.3	+ 27.6	1,379	1,066	+ 29.4
Shirts, cotton or man-made knit, total	18,866.0	15,903.0	+ 18.6	587,489	453,800	+ 29.5
Taiwan	4,736.0	4,133.5	+ 14.6	155,330	124,955	+ 24.3
Korea	3,627.9	2,836.7	+ 27.9	117,457	83,270	+ 41.1
Hong Kong	3,040.3	2,768.8	+ 9.8	103,258	92,565	+ 11.6
Sweaters, cashmere, knit total	55.9	39.0	+ 43.3	21,577	15,932	+ 35.4
Hong Kong	22.6	26.6	- 15.0	8,004	9,530	- 16.0
Mainland China	15.2	1.7	+794.0	4,362	553	+688.8
United Kingdom	9.3	5.5	+ 69.1	5,094	3,370	+ 51.2
Sweaters, sheep-like hair, knit, total	164.8	130.9	+ 25.9	21,589	15,338	+ 40.8
Hong Kong	84.4	71.6	+ 17.9	10,985	8,468	+ 29.7
Mainland China	22.5	21.3	+ 5.6	1,715	1,635	+ 4.9
Italy	15.3	10.3	+ 48.5	2,727	1,613	+ 69.1
Sweaters, wool, knit, total	1,663.8	1,386.4	+ 20.0	164,502	134,787	+ 22.0
Hong Kong	789.8	753.7	+ 4.8	81,194	73,824	+ 10.0
Mainland China	211.5	187.5	+ 12.8	13,406	11,855	+ 13.1
Sri Lanka	101.2	41.1	+146.2	5,816	2,413	+141.0

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear & Separates by Leading Country of Origin, 1982, 1983

(continued)

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Sweaters, man-made, knit total	8,895.7	7,601.1	+ 17.1%	$448,441	$393,753	+ 13.9%
Taiwan	3,705.9	3,012.9	+ 23.0	207,857	178,318	+ 16.6
Korea	2,813.3	2,396.3	+ 17.4	131,219	116,755	+ 12.4
Hong Kong	1,106.5	1,006.2	+ 10.0	64,020	56,422	+ 13.5
Sweaters, cotton, knit total	660.7	610.7	+ 8.2	65,850	53,729	+ 22.6
Hong Kong	272.1	307.4	- 11.5	30,167	29,158	+ 3.5
Taiwan	79.2	44.4	+ 78.4	6,747	3,526	+ 91.3
Korea	61.1	49.3	+ 23.9	5,066	3,818	+ 32.7
Pants, slacks & shorts, cotton, not knit, total	11,486.7	7,753.9	+ 48.1	665,403	490,754	+ 35.6
Hong Kong	4,647.9	3,352.7	+ 38.6	311,571	241,134	+ 29.2
Mainland China	1,812.8	695.2	+160.8	74,442	35,476	+109.8
Japan	1,264.8	997.9	+ 26.7	75,963	60,136	+ 26.3
Pants, slacks & shorts, wool, not knit, total	173.8	117.5	+ 47.9	32,109	21,358	+ 50.3
Hong Kong	36.6	28.9	+ 26.6	7,040	4,970	+ 41.6
Japan	20.2	27.9	- 27.6	3,758	3,720	+ 1.0
Italy	19.9	7.7	+158.4	5,511	3,417	+ 61.3
Pants, slacks & shorts, man-made, not knit, total	5,152.0	5,761.9	- 10.6	203,988	204,914	- 0.5
Taiwan	2,548.6	2,234.9	+ 14.0	113,668	94,910	+ 19.8
Mainland China	884.3	1,721.8	- 48.6	18,990	37,139	- 48.9
Hong Kong	476.2	553.8	- 14.0	19,840	24,260	- 18.2
Pants, slacks & shorts, silk, not knit, total	62.1	62.1	--	10,083	10,035	+ 0.5
Hong Kong	47.0	40.6	+ 15.8	7,534	6,608	+ 14.0
Mainland China	7.0	14.1	- 50.4	647	1,352	- 52.1
Korea	2.4	2.7	- 11.1	628	700	- 10.3
Skirts, cotton, not knit, total	1,540.2	1,163.3	+ 32.4	93,951	74,544	+ 26.0
Hong Kong	436.1	325.5	+ 34.0	30,891	29,975	+ 3.1
India	333.1	304.5	+ 9.4	18,151	17,255	+ 5.2
Mainland China	197.5	98.4	+100.7	7,537	4,152	+ 81.5

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Women's & Children's Sportswear & Separates by Leading Country of Origin, 1982, 1983

(continued)

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Skirts, man-made, not knit total	821.7	381.9	+115.1	$55,888	$27,308	+104.7%
Taiwan	348.9	147.6	+136.4	21,602	8,560	+152.4
Hong Kong	92.2	63.2	+ 45.9	8,489	7,027	+ 20.8
India	68.9	24.7	+178.9	4,284	1,663	+157.6
Skirts, wool, not knit total	212.2	109.4	+ 94.0	35,365	22,458	+ 57.5
Hong Kong	47.0	30.2	+ 55.7	6,629	6,354	+ 4.3
Korea	32.9	14.8	+122.3	4,730	2,091	+126.2
Mainland China	26.9	5.7	+371.9	2,871	588	+388.3
Skirts, wool, knit, total	31.0	21.7	+ 42.9	5,140	3,523	+ 45.9
Hong Kong	14.2	16.2	- 12.3	1,720	2,062	- 16.6
Mainland China	4.6	na	na	513	na	na
Italy	2.5	0.9	+177.8	830	404	+105.4
Skirts, cotton or man-made knit, total	431.2	267.5	+ 61.2	15,253	12,513	+ 21.9
Taiwan	243.1	143.8	+ 69.1	5,689	4,601	+ 23.6
Hong Kong	86.5	72.3	+ 19.6	4,689	4,283	+ 9.5
Korea	22.5	11.7	+ 92.3	821	473	+ 73.6
Playsuits, cotton, not knit, total	1,205.6	1,465.7	- 17.7	34,178	40,977	- 16.6
Mainland China	557.5	647.3	- 13.9	13,562	15,490	- 12.4
Hong Kong	203.2	312.7	- 35.0	6,472	10,019	- 35.4
Philippines	183.6	230.7	- 20.4	4,896	6,141	- 20.3

na = not available

* The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports,
FT 135 December 1982, 1983.

FOREIGN TRADE

Exports

Exports of women's and children's sportswear in 1983 rose a bare 2.5% in value to $62.8 million despite an 11.5% jump in the quantity exported, due largely to the unfavorable exchange rate of the dollar. The export value of women's, misses' and juniors' blouses and shirts, according to the U.S. Bureau of Industrial Economics, totaled about $32.6 million in 1983, 8.7% above the previous year.

From 1972 through 1983, exports of women's, misses' and juniors' blouses and shirts increased in value at a 25.0% compound annual rate. Exports as a percentage of domestic shipments equaled 1.2% in this category.

Summary of Exports of Women's & Children's Sportswear & Separates, 1982, 1983

	Quantity (Thous. Doz.)		% Change	Value F.A.S.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Total, all reported categories	2,344.3	2,102.8	+ 11.5%	$62,820	$61,284	+ 2.5%
Pants, slacks & shorts, total	719.5	738.3	- 2.5	19,233	20,152	- 4.6
Not knit	343.5	421.7	- 18.5	12,461	13,565	- 8.1
Denim, of cotton	34.0	48.3	- 29.6	1,412	2,233	- 36.8
Cotton, other than denim	76.1	141.5	- 46.2	2,983	5,152	+ 42.1
Wool	20.2	4.8	+320.8	1,803	310	+481.6
Man-made	187.0	211.4	- 11.5	4,901	7,151	- 31.5
Other	26.2	15.7	+ 66.9	1,362	952	+ 43.1
Knit	376.0	316.6	+ 18.8	6,772	6,587	+ 2.9
Cotton	80.7	47.7	+ 69.2	2,010	1,768	+ 13.7
Wool	125.7	77.6	+ 62.0	999	377	+165.0
Man-made	72.8	88.2	- 17.5	1,351	2,250	- 40.0
Other	96.8	103.1	- 6.1	2,412	2,192	+ 10.0
Skirts, total	108.3	130.4	- 16.9	5,251	6,859	- 23.4
Not knit	62.7	75.3	- 16.7	3,345	4,703	- 28.9
Wool	2.8	8.3	- 66.3	155	472	- 67.2
Cotton	34.4	31.4	+ 9.5	1,832	1,649	+ 11.1
Man-made	23.3	31.9	- 27.0	1,199	2,273	- 47.2
Other	2.2	3.7	- 40.5	159	309	- 48.5
Knit	45.6	55.1	- 17.2	1,906	2,156	- 11.6
Wool	1.1	2.6	- 57.7	123	246	- 50.0
Cotton	16.0	24.3	- 34.2	411	693	- 40.7
Man-made	10.1	24.0	- 57.9	386	935	- 58.7
Other	18.4	4.2	+338.1	986	282	+249.6
Blouses & shirts, total	1,475.8	1,200.7	+ 22.9	36,782	32,874	+ 11.9
Knit	432.6	401.9	+ 7.6	10,908	12,813	- 14.9
Cotton	140.2	146.3	- 4.2	3,712	5,366	- 30.8
Wool	23.2	9.5	+144.2	676	435	+ 55.4
Man-made	232.9	203.2	+ 14.6	5,652	5,945	- 4.9
Other	36.3	42.9	- 15.4	868	1,067	- 18.6

(continued)

FOREIGN TRADE

Exports

Summary of Exports of Women's & Children's Sportswear & Separates, 1982, 1983
(continued)

	Quantity (Thous. Doz.)		% Change	Value F.A.S.* (Thous. $)		% Change
	1983	1982	1983/1982	1983	1982	1983/1982
Blouses (continued)						
Not knit	1,043.2	798.8	+ 30.6%	$25,874	$20,061	+ 29.0%
Cotton	81.9	113.2	- 27.6	2,484	3,322	- 25.2
Wool	1.8	5.2	- 65.4	98	252	- 61.1
Man-made	280.5	244.8	+ 14.6	6,532	6,587	- 0.8
Other	679.0	435.6	+ 55.9	16,760	9,900	+ 69.3
Sweaters, total	40.7	33.4	+ 21.8	1,554	1,399	+ 11.1
Knit						
Wool	7.0	5.6	+ 25.0	367	239	+ 53.6
Cotton	24.7	18.1	+ 36.5	796	509	+ 56.4
Man-made	9.0	9.7	- 7.2	391	651	- 40.0

* The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of exportation, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports FT 410, December 1982, 1983

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The following table shows the demographic impact of the aging of the "baby boom" generation. Between 1983 and 1990, females in the 35-44 year old age bracket will increase 27.9%, while those aged 20-24 years will decrease by 15.3%, according to Census Bureau projections.

By the year 2000, women aged 45-54 years will zoom 64.3% in numbers, surpassing the 46.4% growth in the 35-44 years old category. At the same time, the number of females 15-24 years of age will shrink by 12.4%.

THE POTENTIAL MARKET

Estimated Female Population of the U.S., 1983 & Projections to 2000*

(Numbers in thousands) (Including Armed Forces overseas)

	1983	1990	2000	% Change 1990/1983	% Change 2000/1983
Total all ages	120,209	128,139	137,464	+ 6.6%	+ 14.3%
Under 15 years	25,195	26,658	27,295	+ 5.8	+ 8.3
15 years & older	95,014	101,479	110,169	+ 6.8	+ 15.9
15 - 19 years	9,395	8,299	9,262	- 11.7	- 1.4
20 - 24 years	10,785	9,137	8,422	- 15.3	- 21.9
25 - 34 years	20,147	21,637	18,031	+ 7.4	- 10.5
35 - 44 years	14,940	19,116	21,877	+ 27.9	+ 46.4
45 - 54 years	11,516	13,051	18,923	+ 13.3	+ 64.3
55 - 64 years	11,828	11,180	12,495	- 5.5	+ 5.6
65 years & over	16,403	19,059	21,159	+ 16.2	+ 29.0
Median age	32.1	34.2	37.7		

* Middle series projections reflect the middle assumptions about future levels of fertility, mortality and net migration.

Source: U.S. Bureau of the Census
Current Population Reports,
P-25, No. 952 (May 1984).

The following table covers estimates of the current adult female population in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services and the U.S. Census Bureau.

Some 12 million women in the U.S. population are likely candidates for petite sizes, while another eight million probably look for tall sizes. While other measurements do enter into the size definition, available data is limited to height and weight relationships, While there are 40 million women in the U.S. who are five feet three inches or shorter most weigh over 120 pounds. Only 30% weigh less than 120 lbs.

Research conducted by Associated Merchandising Corp., a major department store operator, grouped American women into average size ranges. Four out of 10 wore junior sizes, 36% wore misses, 13% were in the petite size range and 11% were classified as large or half size wearers.

THE POTENTIAL MARKET

Estimated Number of Women 18-64 Years of Age
By Height & Weight, 1983
(In Thousands)

	Total	% of total	Under 120 lbs.	% of total	120-149 lbs.	% of total	150 lbs. & over	% of total
Total	73,004	100.0%	16,572	22.7%	32,414	44.4%	24,018	32.9%
Height:								
5'3" or less	39,860	54.6	11,973	16.4	16,644	22.8	11,243	15.4
5'4" - 5'6"	26,354	36.1	4,234	5.8	12,411	17.0	9,709	13.3
5'7" or more	6,790	9.3	365	0.5	3,358	4.6	3,066	4.2

Source: Fairchild Market Research Department based on National Health Survey (U.S. Dept. of Health, Education & Welfare) and U.S. Bureau of the Census population projections for 1983 by age.

RETAIL SALES

According to the Bureau of Economic Analysis, personal consumption expenditures--which measures the value at retail of all goods reaching the consumer through any channel, including direct sales by manufacturers and wholesalers, premiums, etc.--of women's and children's wear reached $68.7 billion in 1983. This was 5.9% higher than in 1982 but lower than the overall 8.3% rise in personal consumption expenditures for 1983.

Personal Consumption Expenditures
For Women's & Children's Wear, 1980 - 1983
(Billions of $)

	1983	1982	1981	1980	% Change 1983/82	% Change 1983/80
Personal consumption expenditures, total (goods & services)	$2,158.0	$1,991.9	$1,857.2	$1,668.1	+ 8.3%	+29.4%
Women's & children's wear (except footwear), total	68.7	64.9	62.8	56.9	+ 5.9	+20.7
% of total personal consumption expenditures	3.2%	3.3%	3.4%	3.4%		

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

Personal consumption expenditures for women's, misses' and junior wear in 1983 are estimated at about $55 billion. Sales through retail outlets alone, are approximately $47-to-$49 billion. The share accounted for by the broad category, sportswear, casual wear, separates and jeans, can only be roughly estimated, and is believed to be in the area of 15% to 20% of the total.

RETAIL SALES

A more complete evaluation of the market will be available when the reports on the 1982 Census of Retail Trade are released by the U.S. Bureau of the Census. Preliminary reports (subject to revision) have been released on a few of the store types selling women's separates, etc. Including activewear for women, sales of sportswear and separates in women's ready-to-wear stores have gone up about 59% since the last previous Census covering 1977. This is in current dollars, and inflation of course accounts for much of the increase.

In family clothing stores sales rose 128.5% from 1977 to 1982. In sporting goods stores sales of women's and girls' wear were up 196%.

Findings for department store results in 1982 have not been released yet by the Census Bureau. However, the section on Retail Sales By Store Type includes typical operating ratios for department stores in women's sportswear and separates categories.

Women's Jeans

Beginning in 1982, sales of the basic five-pocket jean, the industry's staple, have slowed. Overall, women's and children's jean sales declined to 217 million units in 1982, 13.9% less than in 1981 and the first sales drop since 1973. Industry sources indicated that the decline might signal that the saturation point has been reached in the now-mature jeans industry. Older, "baby-boom" customers are wearing more casual pants and activewear looks and reducing their jeans purchases. According to a recent Associated Merchandising Corp. survey, 58% of women are looking to buy pants other than jeans.

However, in 1983, women's and children's jeans sales rose 4.1% to 226 million units. Instrumental to the gain were sales of so-called novelty looks--variations on the basic jeans theme. These included striped, checked, stonewashed and distressed denim and new silhouettes, such as capri and cigaret leg jeans. Some analysts expect "proportionately-sized" jeans, which offer a more specialized fit, to account for a larger share of women's jeans sales in the near future. Despite the abundance of different jeans looks, a major jeans manufacturer forecasts a flat demand for jeans starting in 1985.

Women's Activewear

According to an in-depth study of sports in America, women are rapidly catching up to men in their participation in sports activity. Nearly four out of 10 women aged 15 and over in the nationally representative survey participated in five or more different sports regularly (at least once a month, in season) in 1982. The most popular activities for women were swimming (47% of women), jogging and bicycling (38% each), calisthenics (32%) and racquet sports and areobic dancing (25% each).

Almost half (49%) of women surveyed expressed an interest in watching at least five different sports. This type of interest can be translated into non-functional activewear sales, called the "street-active" look.

RETAIL SALES

Women's Activewear

Female Participation in Sports, 1982
(Percent of Women Aged 15 & over)

	Participation Once a Month or More
Swimming	47%
Calisthenics	32
Jogging	38
Bicycling	38
Softball/baseball	22
Bowling	20
Weightlifting	10
Basketball	15
Football/rugby	8
Tennis, racquet sports	25
Pool	14
Boating	22
Table tennis	14
Volleyball	16
Skiing	10
Golf	8
Gymnastics	15
Soccer	6
Handball	3
Wrestling	3
Hoseback riding	8
Archery	3
Fencing	2
Aerobic dancing	25
Lacrosse	1
Hockey	1
Other team sports	4

Source: Miller Lite Report on American Attitudes Towards Sports, 1983. (Miller Brewing Co., Milwaukee, WI.)

In today's activewear market, fashion, fit and a designer or celebrity name are needed for success. Increased competition among an expanding pool of activewear manufacturers, including many traditional sportswear houses, has led to a more fashion-oriented approach to activewear. Career women and active women are particularly inclined to view active apparel as a fashion statement. To capture the fashion market, one of the newest merchandising wrinkle is to present a total head-to-toe look from a single manufacturer, thereby helping the consumer to coordinate her active wardrobe.

RETAIL SALES

Activewear

As the appeal of activewear grows for the masses, more sporting goods stores are expanding their apparel sections. For example, bodywear and accessories (leg warmers, belts, stirrup tights, etc.)--a $600 million category in 1983, according to trade estimates--can now be found in many sports outlets. These retailers recognize the need to cater to their customer's multi-sport, total body fitness interest. And the trend towards activewear shows no sign of abating among the young. A recent survey conducted by Teen Age Research Unlimited found that fully 43% of teenage girls nationwide bought athletic apparel in the last quarter of 1983 alone.

About 52 million swimsuits were sold in the U.S. in 1982 and dollar sales were up 2%; in 1983, sales in dollars increased 4% to $823 million. According to a study reported by the Newspaper Advertising Bureau, women aged 25-39 account for 50% of swimwear sales. The addition of new fabrics, skinnier straps and bold colors has brought swimwear out of the water and into the street, accounting for some of the sales rise. Competitive swimwear, because of its characteristic high front and cross back, is being worn as a top with jeans and shorts.

Activewear sales should gain momentum due to the televised Summer Olympics in 1984 as well as the feeling that fitness is no longer a fad but a part of the new American lifestyle.

Activewear sales projections for the 1982 and 1983 seasons (October-September) have been compiled by the National Sporting Goods Association, through a nationally-representative survey of 80,000 households. Based on these projections, following are estimates on the size of the women's activewear market. Swimwear accounted for almost half (47.7%) of the estimated $1.7 billion market.

Estimated Retail Sales of Women's Activewear, 1982, 1983

	October-September		% Change
	1983(e)	1982(e)	1983/1982
Swimwear	$ 823.2	$ 791.4	+ 4.0%
Golf clothing	53.5	51.0	+ 4.9
Down & fiberfilled parkas	93.5	91.7	+ 2.0
Elastic waist shorts	193.0	174.5	+ 10.6
Skiwear	122.0	115.9	+ 5.3
Sweatshirts	114.9	102.6	+ 12.0
Tennis clothing	60.4	57.6	+ 4.9
Down & fiberfilled vests	50.2	50.0	+ 0.4
Warm-up suits	214.5	210.3	+ 2.0
Total women's activewear sales	1,725.2	1,645.0	+ 4.9

(e) estimated

Source: Fairchild Market Research Department
based on National Sporting Goods Association,
The Sporting Goods Market in 1982, 1983.

RETAIL SALES BY STORE TYPE

Department Stores

Selected Typical (Median) 1982 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Total Upstairs Store (103)*	All Adult Female Apparel (101)*	All Adult Female Sportswear (97)*	Junior Spectator Sportswear (39)*	Junior Active Sportswear (37)*	Women's & Misses' Spectator Sportswear (48)*	Women's & Misses' Active Sportswear (47)*	All Adult Female Jackets & All-Weather Coats (56)*
Net sales, % change from last year	+ 3.8%	+ 3.6%	+ 4.9%	- 5.9%	+ 42.2%	+ 3.7%	+ 9.1%	+ 5.7%
Sales, % of merchandise division	--	100.0	32.7	12.0	1.9	46.8	4.7	1.7
Sales, % to total store sales	90.7	24.7	13.4	2.6	0.4	10.2	1.1	0.7
$ sales per sq. ft. of selling space	$109.0	$133.0	$138.5	$117.2	$ 83.6	$167.3	$158.8	$175.6
Cumulative markon, %	48.4%	51.3%	51.5%	52.0%	52.3%	51.4%	52.0%	50.9%
Gross margin, % of sales incl. cash discounts	41.9	43.1	44.0	45.7	47.7	44.4	47.0	44.0
Markdowns, retail, % of sales	14.4	22.3	21.2	22.4	18.1	22.1	15.7	21.4
Returns, % of sales	8.5	11.6	11.0	11.5	6.8	13.2	9.0	12.1
Sales promotions, % of sales	3.1	3.3	2.7	4.3	3.3	3.7	2.8	3.8
Salespeople's salaries % of sales	7.8	7.2	7.2	5.6	4.9	7.3	6.0	6.4
Number of stock turns	2.7	3.8	4.0	4.6	4.0	4.0	3.8	3.8

*Number in parentheses refers to the number of firms reporting in each category.

Source: National Retail Merchants Association,
"Merchandising & Operating Results of 1982" -
1983 Edition.

RETAIL SALES BY STORE TYPE

Women's Ready-To-Wear Stores

Preliminary results from the 1982 Census of Retail Trade place total sales of women's ready-to-wear stores at $20.3 billion. About 41.2%, or $8.4 billion, was accounted for by sportswear and separates, including $873.4 million in active sportswear merchandise. In 1977, sportswear and separates represented 42.7% of women's ready-to-wear store volume.

Retail Sales of Sportswear & Separates
In Women's Ready-To-Wear Stores, 1977, 1982
(Establishments With Payroll)

	1982(p)		1977		
	Sales (Mil. $)	% of Total	Sales (Mil. $)	% of Total	% Change 1982/1977
Women's ready-to-wear stores, total	$20,310.8	100.0%	$12,343.7	100.0%	+ 64.5%
Slacks, jeans, pants & skirts	3,351.3	16.5	5,270.7	42.7	+ 58.8
Tops (shirts, blouses & sweaters)	4,143.4	20.4			
Women's active sportswear	873.4	4.3			
Number of stores with payroll	44,084	--	40,227	--	--

(p) preliminary.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade (RC82-I-16(P).

Specialty Stores

Selected Typical (Median) 1982 Merchandising & Operating Results
In Specialty Stores with Total Annual Sales over $1 Million

	All Adult Female Apparel (35)*	Women's & Misses' Sportswear (31)*	Women's & Misses' Spectator Sportswear (14)*	Women's & Misses' Active Sportswear (11)*	Juniors' Sportswear (23)*
Net sales, % change from last year	+ 2.9%	+ 1.9%	- 0.4%	+ 2.8%	+ 3.4%
Sales, % of merchandise division	100.0	46.4	33.3	3.5	19.8
Sales, % to total store sales	51.8	22.4	14.8	1.6	11.8
$ sales per sq. ft. of selling space	$150.3	$160.0	$194.3	$132.3	$167.1
Cumulative mark-on, %	51.6%	52.4%	52.1%	52.9%	52.5%
Gross margin, % of sales incl. cash discounts	43.2	42.4	41.3	45.2	43.5
Markdowns, retail, % of sales	23.8	24.8	24.5	23.8	22.3
Returns, % of sales	11.2	10.9	na	na	9.2
Sales promotions, % of sales	2.7	2.3	na	na	1.8
Salespeople's salaries, % of sales	7.2	7.1	na	na	7.3
Number of stock turns	3.6	3.8	3.8	3.4	4.2

na = not available
* Number in parentheses refers to the number of firms responding in each area.

Source: National Retail Merchants Association,
"Merchandising & Operating Results of 1982"
1983 Edition.

RETAIL SALES BY STORE TYPE

Family Clothing Stores

Sales in family clothing stores in 1982 totaled $13.5 billion, according to preliminary estimates from the census of retail trade. Of this total, 22.2% (or $2.991 billion) was accounted for by women's sportswear and separates, up from 17.7% in 1977. Women's active sportswear purchases amounted to $323.3 million in family clothing stores in 1982.

With 17,899 family clothing establishments in operation at the end of 1982, sales per store equaled approximately $752.6 thousand, 54.6% above the $486.8 thousand average generated by 16,025 establishments in 1977.

Retail Sales of Women's Sportswear & Separates
In Family Clothing Stores, 1977, 1982
(Establishments with Payroll)

	1982(p)		1977		
	Sales (Mil. $)	% of Total	Sales (Mil. $)	% of Total	% Change 1982/1977
Family clothing stores, total	$13,471.4	100.0%	$7,801.0	100.0%	+ 72.7%
Slacks, jeans, pants & skirts	1,199.0	8.9			
Tops (shirts, blouses & sweaters)	1,468.4	10.9	1,380.8	17.7	+128.5
Women's active sportswear	323.4	2.4			
Number of stores with payroll	17,899	--	16,025	--	--

(p) preliminary.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade, RC82-I-17(P).

Sporting Goods Stores

To an increasing extent in recent years sporting goods stores have added women's apparel lines to their inventories. Preliminary data for 1982 shows sales of women's and girls' wear rising to 4.8% of total sales, up from 2.9% in 1977.

Sporting Goods Stores & Bicycle Shops
(Establishments With Payrolls)

	1982(p)		1977	
	Sales (Mil. $)	% of Total	Sales (Mil. $)	% of Total
Total sales	$ 7,522.4	100.0%	$ 4,190.0	100.0%
Women's & girls' wear (except footwear)	361.1	4.8	163.4	2.9
Number of stores with payroll	20,129	--	17,235	--

(p) preliminary

Source: U.S. Bureau of the Census,
Census of Retail Trade, RD82-I-28(P).

RETAIL ADVERTISING

Percent of Year's Total Newspaper Linage Run By Retailers Each Month, 1982

	Coats & Jackets	Jeans, Pants & Shorts	Sweaters & Knit Tops	Swimsuits & Beachwear	Woven Blouses & Shirts	Juniors' Sportswear
January	7.2%	5.7%	4.5%	4.2%	5.0%	4.9%
February	6.9	8.5	5.3	4.1	8.3	7.9
March	7.4	9.6	6.0	4.0	10.0	8.9
April	6.0	10.7	7.5	6.5	9.8	7.6
May	2.6	9.9	9.1	22.5	9.0	6.9
June	2.4	7.2	5.5	28.3	4.9	3.7
July	4.0	6.8	5.6	15.1	6.1	7.2
August	9.5	10.0	9.0	2.9	8.6	14.6
September	11.2	8.8	9.6	0.4	9.4	8.0
October	17.0	7.3	10.1	0.7	8.0	8.7
November	13.5	7.7	13.2	4.5	11.1	10.8
December	12.2	7.8	14.6	6.8	9.8	10.8
Year	100.0	100.0	100.0	100.0	100.0	100.0

Source: The Advertising Checking Bureau, Inc., Neustadt Reports Division, covering all retail newspaper advertising linage in all newspapers in seven cities: Chicago, Dallas, Philadelphia, Cincinnati, Cleveland, Los Angeles and Washington. (1984 Newspaper Planbook).

CONSUMER PRICE TRENDS

Retail prices for women's apparel rose 1.7% in the twelve months ended May 1984 compared with a 4.2% increase for the overall Consumer Price Index over the same period. Prices of women's separates and sportswear declined by 5.4% during this period.

Consumer Price Indexes for Selected Women's Apparel Items
1982, 1983 & May 1983, 1984
(1967 = 100 unless other specified)

	May			Annual Average		
	1984	1983	% Change 1984/83	1983	1982	% Change 1983/1982
All items	309.7	297.1	+ 4.2%	303.5	292.4	+ 3.8%
Apparel commodities less footwear	181.5	180.2	+ 0.7	183.4	178.4	+ 2.8
Women's apparel (1977=100)	107.9	106.1	+ 1.7	109.5	105.5	+ 3.8
Coats & jackets	163.5	164.7	- 0.7	170.3	166.3	+ 2.4
Separates & sportswear (1977=100)	92.8	98.1	- 5.4	98.9	97.1	+ 1.8

Source: U.S. Department of Labor, Bureau of Labor Statistics.

CONSUMER BUYING HABITS

In a September 1983 survey undertaken by R.H. Bruskin Associates for Daily News Record (September 29, 1983), a fifth of the nationally representative sample of 500 women indicated that in the 12 months following the survey purchases of active sportswear items would increase in relation to the amount spent on activewear in the year prior to the survey. Almost a third (32.6%) of the men and women aged 18-34 years intended to raise their level of spending on active sportswear over this period.

Intention to Purchase Active Sportswear Compared With Previous 12 Months

	Intend to Purchase:						
	Much More	Somewhat More	About the Same	Somewhat Less	Much Less	None	Don't Know
Total	8.2%	13.6%	52.4%	9.1%	11.4%	4.2%	1.1%
By Sex							
Male	7.6	14.9	56.7	7.0	8.2	4.1	1.5
Female	8.8	12.3	48.5	11.1	14.2	4.3	0.8
By Age							
18-24 years	15.6	16.5	48.7	8.6	9.6	1.0	--
25-34 years	11.5	21.7	46.3	10.8	8.3	1.0	0.5
35-49 years	5.7	15.9	60.0	7.1	8.4	1.9	1.0
50-64 years	4.1	7.3	61.2	7.7	15.2	3.3	1.3
65 years & older	3.5	4.6	45.7	10.9	14.8	17.4	3.1
By Income							
Under $15,000	8.1	6.3	47.1	11.8	16.6	8.4	1.7
$15,000-19,999	9.9	10.7	50.4	10.0	12.8	6.3	--
$20,000-29,999	10.0	19.2	53.9	7.5	7.6	1.1	0.6
$30,000-39,999	6.3	14.1	61.8	7.6	9.4	0.7	--
$40,000 & over	4.9	26.0	59.2	4.1	2.6	2.5	0.8
By Region							
Northeast	8.4	15.7	46.7	8.6	13.4	6.0	1.1
North Central	4.3	13.7	55.0	11.2	10.9	4.1	0.9
South	11.0	11.9	54.4	8.6	10.7	2.2	1.2
West	8.5	13.9	52.0	7.8	10.7	5.6	1.5

The following information on purchase of women's sportswear for females aged 14 and older for the years 1983 and 1982 has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, N.Y. The information is based on findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families.

CONSUMER BUYING HABITS

Jackets

Purchases of women's jackets declined 3.9% in dollars and 1.4% in units in 1983 compared with the previous year, according to households reporting to NPD.

Purchases of Women's Jackets by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	29.1	26.1	35.1	30.7
Mass merchandisers (Sears/Penneys/ Wards/K-mart)	22.1	24.0	16.3	17.5
Discount stores	12.5	13.4	8.9	10.2
Specialty stores	25.4	27.4	30.4	34.3
All other outlets	9.4	8.2	7.9	6.4
No answer	1.4	1.0	1.4	1.0

Purchases of Women's Jackets by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $20.00	41.0	35.9	17.7	14.9
$20.00 - $39.99	37.0	40.8	34.4	36.8
$40.00 - $69.99	15.6	17.4	25.7	28.4
$70 & over	6.4	6.0	22.2	19.9

Purchases of Women's Jackets by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	19.5	19.6	15.8	16.5
Polyester/cotton blend	20.7	19.7	18.1	18.9
Other polyester blends	10.6	10.4	11.7	10.5
100% cotton	13.8	15.5	12.1	14.8
100% wool & wool blends	10.3	8.3	19.9	15.5
100% nylon & nylon blends	11.8	12.8	7.2	8.5
All other fibers	8.5	8.1	10.9	9.4
No answer	4.9	5.4	4.3	5.9

Purchases of Women's Jackets by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	10.8%	9.3%	8.4%	7.9%	6.8%	3.8%	3.8%	7.3%	7.9%	10.1%	11.0%	12.8%	100.0%
1982	10.4	8.4	9.2	9.5	5.1	3.8	5.6	7.2	9.2	10.5	10.6	10.5	100.0
Dollars:													
1983	11.2	7.4	7.2	7.1	6.2	3.1	3.0	7.0	8.7	11.2	12.4	15.5	100.0
1982	12.0	7.4	7.7	8.2	4.2	2.5	4.2	7.2	9.6	11.8	12.5	12.6	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Skirts/Blouses

NPD panelists purchased 4.2% fewer skirts/blouses in 1983 than in 1982, resulting in a 1.3% decline in dollar expenditures for these items.

Purchases of Women's Skirts/Blouses by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0
Department stores	26.0	22.6	31.8	29.0
Mass merchandisers (Sears/Penneys/ Wards/K-mart)	23.8	25.8	19.4	19.8
Discount stores	15.6	16.2	11.6	11.6
Specialty stores	24.0	25.0	28.1	30.2
All other outlets	9.7	9.5	8.1	8.4
No answer	0.9	0.9	1.1	1.0

Purchases of Women's Skirts/Blouses by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $8.00	31.7	35.9	14.2	14.8
$8.00 - $15.99	45.2	41.9	42.2	41.4
$16.00 - $23.99	15.2	14.7	23.3	23.9
$24.00 & over	7.9	7.4	20.3	19.9

Purchases of Women's Skirts/Blouses by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	37.7	36.8	41.6	39.7
Polyester/cotton blends	43.4	41.1	38.6	38.8
100% cotton	7.9	7.6	8.0	7.1
All other fibers	8.0	11.5	8.7	11.0
No answer	3.1	3.0	3.1	3.3

Purchases of Women's Skirts/Blouses by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	7.1%	6.1%	7.9%	8.3%	9.4%	8.3%	9.3%	8.7%	7.1%	7.5%	9.4%	10.8%	100.0%
1982	6.4	5.9	7.9	9.6	9.5	7.7	9.2	9.4	7.6	7.7	8.3	10.8	100.0
Dollars:													
1983	6.8	5.8	8.2	8.6	9.2	7.7	7.9	7.9	7.2	8.3	10.1	12.3	100.0
1982	6.2	5.6	8.2	8.9	9.0	6.8	8.4	8.3	7.0	9.0	9.4	12.1	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Jeans

Among NPD member households, denim jean purchases in 1983 were flat in both dollars and units compared with 1982. Dollar expenditures of women's corduroy jeans in 1983 dropped 18.4% from 1982 on a 21.9% reduction in unit sales. Other types of women's jeans slid 44.0% in dollars, with unit sales down 33.7%.

Purchases of Women's Jeans by Store Type, 1982, 1983

	Denim Jeans		Corduroy Jeans		Other Women's Jeans	
	1983	1982	1983	1982	1983	1982
			Percent of Units			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	18.2	18.0	20.0	19.3	17.6	27.8
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	23.6	23.0	17.2	24.6	37.0	38.4
Discount stores	21.6	18.4	19.2	14.8	13.1	8.5
Specialty stores	26.5	28.8	28.8	32.4	20.6	18.1
All other outlets	9.0	10.6	13.8	8.3	10.4	7.1
No answer	1.1	1.2	1.0	0.6	1.3	--
			Percent of Dollars			
Total	100.0	100.0	100.0	100.0	100.0	100.0
Department stores	21.0	21.5	22.8	23.7	21.8	30.8
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	20.4	18.1	15.3	22.5	29.5	33.9
Discount stores	19.9	16.5	18.8	12.6	10.3	7.1
Specialty stores	29.3	32.8	28.9	33.8	24.0	22.4
All other outlets	7.9	9.8	12.4	6.9	11.9	5.9
No answer	1.5	1.3	1.9	0.4	2.4	--

Purchases of Women's Jeans by Price Points, 1982, 1983

	Denim Jeans		Corduroy Jeans		Other Women's Jeans	
	1983	1982	1983	1982	1983	1982
			Percent of Units			
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $12.00	24.9	30.6	33.7	44.2	40.0	43.2
$12.00-$17.99	35.6	29.7	38.1	30.2	22.0	28.8
$18.00-$24.99	28.3	25.2	18.7	15.8	23.3	16.0
$25.00 & over	11.3	14.5	9.5	9.8	14.7	12.0
			Percent of Dollars			
Total	100.0	100.0	100.0	100.0	100.0	100.0
Less than $12.00	12.3	15.6	16.4	24.8	19.3	24.2
$12.00-$17.99	31.9	26.6	38.9	31.8	20.2	28.9
$18.00-$24.99	35.3	31.4	25.7	23.3	29.8	22.9
$25.00 & over	20.5	26.5	18.9	20.2	30.7	23.9

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Jeans

Purchases of Women's Jeans by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
% of Units:													
Denim jeans													
1983	6.5%	6.2%	9.6%	7.9%	7.7%	6.4%	7.8%	12.5%	7.3%	8.2%	8.9%	10.9%	100.0%
1982	9.2	6.9	8.3	7.9	6.4	6.7	8.8	11.2	7.4	8.9	8.3	10.0	100.0
Corduroy jeans													
1983	5.4	7.8	5.6	6.0	7.5	4.2	4.7	10.3	6.2	13.1	13.3	15.9	100.0
1982	8.6	10.7	6.7	5.5	4.3	4.6	6.8	9.1	10.4	9.9	10.3	13.0	100.0
Other jeans													
1983	6.0	7.0	2.5	5.8	6.5	7.2	5.5	17.4	7.2	16.0	9.4	9.5	100.0
1982	3.5	12.7	9.3	18.7	4.4	4.8	6.2	6.1	8.7	7.9	6.1	11.6	100.0
% of Dollars:													
Denim jeans													
1983	6.3	6.5	9.0	8.1	7.1	6.2	7.8	13.0	7.2	8.0	9.3	11.3	100.0
1982	8.4	6.9	8.2	7.6	6.4	6.8	8.3	11.7	7.6	8.9	8.8	10.4	100.0
Corduroy													
1983	5.3	5.0	4.6	4.5	7.4	4.6	3.5	11.8	8.3	12.7	15.1	17.2	100.0
1982	8.0	11.4	6.9	5.1	3.3	3.2	5.9	9.2	10.8	11.2	10.5	14.4	100.0
Other jeans													
1983	4.4	6.4	3.0	5.6	6.7	7.4	6.9	22.7	8.4	10.1	10.7	7.5	100.0
1982	2.4	11.5	8.8	20.5	5.0	4.4	5.5	4.2	14.6	7.4	6.3	9.3	100.0

Purchases of Women's Jeans by Fibers, 1982, 1983

	Denim Jeans				Corduroy Jeans			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	16.2	16.7	16.3	14.8	46.8	52.1	50.0	51.9
100% cotton	72.7	68.8	72.0	69.0	43.0	37.5	39.5	37.5
All other fibers	5.3	8.5	5.5	9.7	6.7	5.0	7.0	5.6
No answer	5.8	5.9	6.2	6.4	3.5	5.4	3.4	5.0

	Other Women's Jeans			
	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	9.1	16.0	10.2	12.5
Polyester/cotton blend	41.4	53.0	41.9	51.6
Other polyester blends	11.0	0.9	5.2	0.6
100% cotton	25.6	20.1	25.9	25.1
Cotton blends	6.7	3.2	12.9	3.0
All other fibers	4.9	0.9	3.0	0.7
No answer	1.3	5.9	0.9	6.5

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

Slacks

Purchases of women's corduroy slacks rose 8.1% in dollars and 17.2% in units between 1982 and 1983, according to NPD panel members. Non-corduroy slack purchases were up 7.9% in dollars and 7.8% in quantity during the same period.

Purchases of Women's Slacks by Store Type, 1982, 1983

	Corduroy Slacks				Non-corduroy Slacks			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department stores	24.3	26.2	26.9	31.7	28.0	28.2	33.3	34.6
Mass merchandisers (Sears/ Penneys/Wards/K-mart)	19.9	20.1	17.3	15.4	24.8	25.5	20.1	19.7
Discount stores	16.4	11.0	13.5	8.8	13.3	12.2	10.5	9.6
Specialty stores	30.5	33.9	33.5	35.9	24.0	23.6	28.1	27.9
All other outlets	8.2	6.8	8.0	6.4	9.1	9.6	7.4	7.3
No answer	0.8	1.9	0.8	1.9	0.7	0.9	0.6	0.8

Purchases of Women's Slacks by Price Points, 1982, 1983

	Corduroy Slacks				Non-corduroy Slacks			
	Units		Dollars		Units		Dollars	
	1983	1982	1983	1982	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Less than $12.00	35.8	30.7	19.1	15.4	49.2	50.2	27.6	27.2
$12.00-$17.99	30.9	32.5	30.6	29.4	28.0	25.4	29.6	26.9
$18 & over	33.3	36.8	50.3	55.2	22.8	24.4	42.8	45.9

Purchases of Women's Slacks by Fibers, 1982, 1983

	Percent of Units		Percent of Dollars	
	1983	1982	1983	1982
		Corduroy Slacks		
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	52.0	48.0	54.2	49.6
100% cotton	32.5	37.2	31.8	36.0
100% polyester	5.9	8.2	4.8	6.3
All other fibers	3.4	2.5	3.7	2.2
No answer	6.1	4.1	5.5	5.9
		Non-Corduroy Slacks		
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	50.0	56.1	42.6	48.0
Polyester/cotton blend	24.3	18.6	25.1	20.2
Other polyester blends	7.8	7.9	9.1	10.1
100% cotton & cotton blends	8.7	6.4	9.7	6.9
All other fibers	5.4	7.0	9.6	10.9
No answer	3.9	3.9	3.8	4.0

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

Active Sportswear - Swimwear

As reported by NPD, women's purchases in 1983 dipped 9.3% in dollars and 4.2% in the quantity purchased compared with 1982.

Purchases of Women's Swimwear by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	31.4	24.0	41.4	32.2
Mass merchandisers (Sears/Penneys/ Wards, K-mart)	25.9	28.9	20.1	22.8
Discount stores	10.8	11.3	6.9	8.1
Specialty stores	22.4	25.9	23.6	27.8
All other outlets	9.1	9.4	7.3	8.4
No answer	0.4	0.5	0.7	0.7

Purchases of Women's Swimwear by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $12.00	28.4	32.4	11.8	13.3
$12.00 - $19.99	33.4	29.6	28.1	25.4
$20.00 - $27.99	17.6	18.2	21.6	23.3
$28.00 & over	20.6	19.8	38.5	38.0

Purchases of Women's Swimwear by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blend	12.7	6.5	12.1	6.9
100% polyester & other polyester blends	6.3	7.1	5.7	5.7
100% nylon & nylon blends	69.9	75.7	69.7	77.2
All other fibers	4.7	3.2	4.7	2.6
No answer	6.4	7.4	7.8	7.5

Purchases of Women's Swimwear by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	1.6%	2.9%	6.0%	10.4%	15.6%	25.2%	22.8%	10.9%	1.9%	1.0%	0.8%	0.9%	100.0%
1982	1.5	3.8	7.2	6.8	16.9	20.7	31.0	8.0	3.0	0.8	0.2	0.1	100.0
Dollars:													
1983	1.3	3.4	6.2	10.1	16.5	26.3	22.3	10.8	1.3	0.7	0.4	0.9	100.0
1982	1.5	3.9	8.2	7.8	16.6	20.8	30.6	8.0	1.6	0.5	0.5	*	100.0

* Less than 0.1%

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Women's Shorts/Tennis Dresses

Dollar expenditures of women's shorts and tennis dresses increased 18.5% in 1983, as the quantity purchased by NPD households rose 8.7%.

Purchases of Women's Shorts/Tennis Dresses by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	21.4	19.7	27.2	27.7
Mass merchandisers (Sears/Penneys/ Wards/K-mart)	27.9	32.5	20.6	25.5
Discount stores	18.9	17.4	14.3	13.7
Specialty stores	20.0	20.4	26.0	22.9
All other outlets	11.3	9.5	11.3	9.6
No answer	0.6	0.6	0.6	0.6

Purchases of Women's Shorts/Tennis Dresses by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $5.00	36.1	46.9	14.7	21.5
$5.00 - $10.99	45.1	36.1	45.3	39.7
$11.00 & over	18.8	17.0	40.0	38.8

Purchases of Women's Shorts/Tennis Dresses by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester	16.8	23.8	10.7	15.7
Polyester/cotton blend	55.0	50.6	58.5	57.8
100% cotton	15.4	10.9	20.7	15.1
All other fibers	8.6	11.6	7.0	8.7
No answer	4.2	3.1	3.1	2.7

Purchases of Women's Shorts/Tennis Dresses by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	1.3%	1.9%	7.4%	12.7%	19.5%	25.6%	19.7%	6.6%	2.5%	1.7%	0.6%	0.4%	100.0%
1982	1.1	3.5	7.6	13.5	23.9	19.4	19.4	6.3	3.1	1.1	0.4	0.7	100.0
Dollars:													
1983	1.4	2.9	8.4	13.0	19.4	23.7	19.9	6.3	2.7	0.8	0.9	0.6	100.0
1982	1.2	3.2	9.3	14.0	24.9	19.9	16.8	6.4	2.1	1.1	0.4	0.7	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Women's Sweatshirts

In 1983, women's sweatshirt purchases made by NPD panel members climbed 43.8% in dollars and 40.0% in units versus a year earlier.

Purchases of Women's Sweatshirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	16.0	14.1	19.3	17.4
Mass merchandisers (Sears/Penneys/ Wards/K-mart)	31.0	34.6	28.3	31.4
Discount stores	18.0	19.0	14.5	15.4
Specialty stores	17.6	18.1	20.4	20.0
All other outlets	16.3	13.8	16.5	15.3
No answer	1.0	0.4	1.1	0.6

Purchases of Women's Sweatshirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $8.00	45.3	47.2	26.5	27.9
$8.00 - $13.99	36.8	36.8	39.3	40.5
$14.00 & over	17.8	16.0	34.1	31.5

Purchases of Women's Sweatshirts by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Polyester/cotton blends	28.3	27.4	29.4	30.1
100% acrylic	19.6	16.4	19.6	16.2
Acrylic blends	37.2	34.6	33.1	31.2
100% cotton & cotton blends (primarily cotton)	7.9	10.1	9.7	10.6
All other fibers & blends	7.0	11.4	8.2	11.9

Purchases of Women's Sweatshirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1982	6.2%	7.7%	5.9%	4.2%	4.5%	3.7%	6.1%	8.8%	7.9%	11.6%	13.8%	19.5%	100.0%
1983	6.3	6.0	8.4	4.1	3.6	3.0	6.1	9.6	10.2	13.0	13.0	16.7	100.0
Dollars:													
1982	5.7	7.6	5.6	3.9	4.1	3.6	5.0	9.8	8.0	11.1	14.9	20.5	100.0
1983	4.9	4.7	8.7	3.6	3.6	2.5	4.7	10.2	10.2	12.4	15.4	19.0	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Sweaters

Dollar expenditures of women's sweaters fell 8.8% in 1983 compared with 1982 as the number of sweaters purchased by households included in the NPD survey dropped 6.0%

Purchases of Women's Sweaters by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	27.7	26.9	31.3	30.9
Mass merchandisers (Sears/Penneys/ Wards/K-mart)	18.8	21.4	15.4	16.7
Discount stores	17.1	15.1	12.9	10.9
Specialty stores	28.0	27.5	32.0	32.2
All other outlets	7.5	8.3	7.3	8.6
No answer	1.0	0.7	1.1	0.7

Purchases of Women's Sweaters by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $9.99	35.7	38.8	18.0	18.9
$10.00 - $19.99	45.3	44.7	44.3	44.9
$20.00 & over	19.1	16.6	37.8	36.2

Purchases of Women's Sweaters by Fibers, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
100% polyester & polyester blends	8.9	10.2	7.1	7.9
100% cotton & cotton blends	9.6	5.0	11.2	5.8
100% wool & wool blends	11.1	10.5	15.3	15.0
100% acrylic	49.2	51.7	41.8	45.2
Acrylic blends	11.6	14.4	12.6	15.1
All other fibers	5.7	3.9	8.3	7.0
No answer	4.0	4.1	3.7	4.0

Purchases of Women's Sweaters by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	70.1%	5.5%	3.0%	2.6%	2.1%	1.6%	3.5%	7.3%	8.6%	12.7%	18.0%	24.9%	100.0%
1982	10.8	6.9	4.5	3.0	1.8	1.7	2.6	6.3	8.4	11.9	17.4	24.8	100.0
Dollars:													
1983	9.6	4.6	2.8	2.4	2.0	1.6	3.3	7.1	8.6	12.7	18.4	26.8	100.0
1982	10.2	5.3	3.4	2.7	1.7	1.6	3.7	5.9	8.7	12.1	17.8	26.9	100.0

Source: NPD Special Industry Services.

CONSUMER BUYING HABITS

SEVENTEEN Magazine's annual Spring Apparel Buying study, conducted most recently in May 1983, detailed what teen girls spent on their 1983 wardrobe. Completed questionnaires were received by 1,027 members of SEVENTEEN's Consumer Panel, which represents a cross section of the teenage market. These results were then projected to the entire market.

Teenage Buying Trends for Sportswear & Separates

	Number Purchasing Add (000)	Number Purchased Add (000)	Number Expenditures Add (000)
Jackets			
Ski jackets	2,731	2,977	$ 136,198
Blazers	3,443	5,233	255,789
Parkas	637	643	26,517
Jackets - blouson	429	455	14,596
- bomber	247	247	7,617
Leather/suede jackets	611	611	47,689
Fur coats (real)	235	237	34,848
Pea coats	143	143	7,902
Fur jackets (fake)	78	80	3,784
Total buying jackets	5,968	10,626	534,940
Skirts			
Knee-length	5,838	13,486	365,201
Below knee-length	5,565	10,017	256,936
Above knee-length	6,475	13,144	345,819
Total buying skirts	10,571	36,647	967,956

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

RETAILING/MERCHANDISING TRENDS: Covers trends in sales of specific retail outlet types, competitive developments in retailing (such as off-price retailing, franchising, designer names, private labels). Trends in number of outlets by size; regional developments in retailing. (December)

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (Special Fact File for 1984, $15.00) (July)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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The Sports/Fitness/ Leisure Markets

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E. B. Gold, Manager
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THE SPORTS/FITNESS/LEISURE MARKET

Measured in terms of a constant dollar, eliminating the effects of inflation, the value of manufacturers' shipments of sporting and athletic goods, not including wheel goods, has registered a compound annual rate of growth of 1.3% in the 1972-83 period. On a current dollar basis, the value of shipments gained 7.2%.

Retail sales of all sports-fitness related products, including equipment, apparel and footwear, in 1983 were estimated at $13.6 billion, gaining 13% over 1982, and are expected to hit over $15 billion in 1984 as the economy continues to revive and employment figures improve.

The industry is composed of many segments producing a wide variety of products. Nearly all segments are prospering, but the most impressive growth is coming in the home exercise market where sales have doubled in the past two years to reach about $1 billion. Much of the gymnasium, exercise and golf equipment is purchased by higher-income consumers who have been less affected by the recent downturn in the economy, and who are able to pay more for higher quality. In addition, the more economy-minded consumer has found that it is less expensive to use exercise equipment at home than to use a health club or other facility; also more convenient.

Interest in health and fitness is expected to continue, and this is a major factor in the outlook for industry growth during the next several years as more emphasis is placed on individual self-improvement, and as the growing number of white-collar workers in the 25-44 age group seek ways to relieve stress and remain active. And this group is becoming more affluent, well able to afford quality equipment and sports apparel.

A recent Gallop Poll indicated that nearly 59% of all adults exercise daily, 12 percentage points more than in 1982 and double the 1961 figure. Some 100 million Americans engage in some form of regular exercise program and 20 million children take part in organized sports activities. The highest incidence of activity is among the 25-34 year olds, a growing age group.

Interest in apparel that has the "look" of active, sports-functional wear has generated much growth in the sportswear and footwear markets. In footwear the trend among "non-participants" is generally away from functional athletic footwear, such as running shoes, which had been popular for everyday street wear, back to sneakers or fashion footwear with a sports look.

With the outlook for the sports and fitness markets so rosy, many major firms have been moving into the industry. New entrants into the market include West Bend Company which has two makers of home exercise equipment and Campbell Soup which has purchased Triangle Manufacturing Company.

While many companies are entering the sports/fitness industry, a number already in the industry are attempting to reposition themselves with an eye toward future demographic trends. Some firms see the aging of the U.S. population as a signal that in the future, participants in sports will gravitate towards less strenuous types of activities. This has caused some companies, particularly athletic footwear companies, to expand their product mixes into apparel and other items which are usable without being used in more demanding forms of exercise.

Demand for sporting goods at the manufacturer level may suffer a decline on the institutional level due to cut-backs in government aid and declining enrollments in schools and colleges. Overall, sporting and athletic goods shipments are expected to increase at a 3.0% compound annual rate during the period ending in 1988, after adjustment for inflation, according to the Bureau of Industrial Economics.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

Preliminary data for the year 1982 has recently been issued by the U.S. Bureau of the Census for industry classifications covered in the following tables. Findings are based on a complete census of manufacturers classified in these industries, which is conducted by the Census Bureau every five years. Compared with 1977 census data, in terms of current dollars--which means they are not adjusted for changes in price levels--the value of shipments of sporting and athletic goods climbed 41%. The number of companies classified in this industry, however, registered a decline of almost 19%.

The value of shipments of the motorcycle-bicycle-parts industry in 1982 rose 20.5% compared with 1977, while the number of companies classified in the industry was down almost 24%.

It should be noted that data for 1982 are preliminary and subject to revision by the U.S. Census Bureau by early 1985. In addition, the final reports will contain detailed information by size of company, regional and state information, etc., not currently available.

Sporting & Athletic Goods, n.e.c. (SIC 3949*)

	1982(p)	1977	% Change 1982/1977
Number of companies	1,428	1,757	- 18.7%
Number of establishments, total**	1,514	1,878	- 19.4
With 20 employees or more	451	496	- 9.1
Employees, total (thous.)	47.5	57.2	- 17.0
Production workers (thous.)	35.7	46.1	- 22.6
Payroll (mil. $)	$ 676.9	$ 525.9	+ 28.7
Value added by manufacture (mil. $)#	nr	1,273.6	--
Value of industry shipments (mil. $)##	3,421.9	2,425.1	+ 41.1
Capital expenditures, new (mil. $)	76.9	62.7	+ 22.6

Motorcycles, Bicycles & Parts (SIC 3751*)

	1982(p)	1977	% Change 1982/1977
Number of companies	261	343	- 23.9%
Number of establishments, total**	266	350	- 24.0
With 20 employees or more	65	63	+ 3.2
Employees, total (thous.)	12.7	15.6	- 18.6
Production workers (thous.)	10.1	13.3	- 24.1
Payroll (mil. $)	$ 220.5	$ 168.9	+ 30.5
Value added by manufacture (mil. $)#	nr	368.9	--
Value of industry shipments (mil. $)##	1,214.6	1,007.6	+ 20.5
Capital expenditures, new (mil. $)	20.0	34.1	- 41.3

(p) preliminary
n.e.c. = not elsewhere classified
nr = not reported

(footnotes continued)

GENERAL INDUSTRY STATISTICS

* Manufacturers are classified by industry under the Standard Industrial Classification system (SIC), determined by the principal products made as shown below:

**Each business location is counted as a separate establishment.

SIC 3949 - This industry comprises establishments primarily engaged in the manufacture of sporting and athletic goods such as fishing tackle; golf and tennis goods; baseball, football, basketball and boxing equipment; billiard and pool tables; roller skates and ice skates; gymnasium and playground equipment; bowling alleys and equipment.

SIC 3751 - This industry comprises establishments primarily engaged in the manufacture of motorcycles, bicycles and similar equipment and parts. Establishments primarily engaged in the assembly of motorcycles or bicycles from purchased parts are also included in this industry.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of the same manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts on contract work and resales). The value of product shipments, including shipments by secondary producers, is covered in the Shipments section of this Fact File.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
Preliminary Report Industry Series
MC 82-I-39B-4(P); MC82-I-37C-4(P)

Employment & Earnings

Current information on employment in the sporting and athletic goods industry is compiled by the U.S. Bureau of Labor Statistics. In the first four months of 1984, production worker employment averaged 8.7% above the level in the same 1983 period, reflecting the growing strength of the U.S. economy.

Average weekly earnings continued to climb, rising 4.5%, on average, over the first four months of 1984 compared with the same 1983 period.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in the Sporting & Athletic Goods Industry (SIC 3949)

	January - April Average			Annual Average		
	1984	1983	% Change 1984/1983	1983	1982	% Change 1983/1982
Sporting & athletic goods:						
All employees (thous.)	58.5	51.6	+ 13.4%	53.1	53.5	- 0.7%
Production workers (thous.)	42.5	39.1	+ 8.7	40.0	41.2	- 2.9
Average weekly earnings	$269.60	$258.02	+ 4.5	$264.80	$243.75	+ 8.6
Average weekly hours	41.1	39.7	+ 3.5	40.0	39.0	+ 2.6
Average overtime hours	2.9	2.0	+ 45.0	2.2	1.8	+ 22.2

Source: U.S. Bureau of Labor Statistics, Employment & Earnings

Employment data issued by the Bureau of Labor Statistics and by the Census Bureau are not directly comparable due to differences in methodology used by each agency in compiling data.

Industry Concentration

In the sporting and athletic goods industry, according to Census Bureau figures for the year 1981, there were 130 plants with 100 or more employees (9.3% of the 1,400 plants with paid employees). These large plants accounted for 58.4% of the industry's total workforce.

There were only 8 plants in the motorcycle/bicycle/parts industry that had 500 or more employees in 1981 (out of an industry total of 267), but these large plants had over 10,000 employees, or almost 60% of the industry total.

The Sporting & Athletic Goods Industry Employment Size, 1981

	Establishments		Employees		Annual Payroll	
	Number	%	Number (thous.)	%	Number	%
Sporting goods & athletic goods industry, total	1,400	100.0%	54.8	100.0%	$ 708.8	100.0%
By establishment size:						
Under 20 employees	899	64.2	5.9	10.8	68.4	9.6
20 to 49 employees	249	17.8	7.9	14.4	96.5	13.6
50 to 99 employees	122	8.7	9.0	16.4	100.2	14.1
100 to 249 employees	94	6.7	15.7	28.6	201.4	28.4
250 to 499 employees	28	2.0	16.3	29.8	242.3	34.3
500 or more employees	8	0.6				

(continued)

Industry Concentration

The Sporting & Athletic Goods Industry Employment Size, 1981
(continued)

	Establishments		Employees		Annual Payroll	
	Number	%	Number (Thous.)	%	Mil. $	%
Motorcycles, bicycles & parts, industry total	267	100.0%	17.4	100.0%	$ 261.6	100.0%
By establishment size:						
Under 20 employees	187	70.0	1.3	7.5	16.7	6.4
20 to 49 employees	38	14.2	1.3	7.5	16.1	6.2
50 to 99 employees	16	6.0	1.2	6.9	13.1	5.0
100 to 249 employees	14	5.2	2.0	11.5	28.4	10.9
250 to 499 employees	4	1.5	1.3	7.5	16.0	6.1
500 or more employees	8	3.0	10.4	59.8	171.3	65.5

Source: U.S. Bureau of the Census,
County Business Patterns, 1981

According to estimates compiled by Sales & Marketing Management Magazine, plants in the sporting goods industry which have 100 or more employees account for over 70% of industry shipments (including all plants with 20 or more employees).

In the motorcycle/bicycle industry, plants with 100 or more employees accounted for 98% of shipments in 1983.

Employment & Share of Shipments in Large Plants, 1981 - 1983

	No. of Plants		Total Shipments* (Mil. $)	% of Shipments Accounted For By Plants with 100+ Employees
	With 20+ Employees	With 100+ Employees		
Sporting & athletic goods industry n.e.c. (SIC 3949)				
1983	585	159	2,921.7	71
1982	553	165	3,024.7	73
1981	560	160	2,987.9	72
Motorcycles, bicycles & parts industry (SIC 3751)				
1983	70	27	1,281.7	98
1982	65	28	781.4	92
1981	67	26	1,101.0	91

* Covers plants with 20 or more employees.

Source: Sales & Marketing Management,
Survey of Industrial Buying Power, 1982,
1983, 1984
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GENERAL INDUSTRY STATISTICS

Operating Ratios

Key Business Ratios in the Sporting & Athletic Goods Industry, 1980
(Median Results)

	Sporting & Athletic Goods	Motorcycles, Bicycles & Parts
Number of manufacturers reporting	288	40
Current assets to current debt (times)	2.36	3.21
Net profits to net sales (percent)	4.59	5.39
Net profits to net worth (percent)	20.03	45.15
Net sales to net worth (times)	4.04	5.22
Net sales to net working capital (times)	4.39	5.71
Average collection period (days)	40	23
Net sales to inventory (times)	5.7	7.4

Source: Dun & Bradstreet, Inc.
Business Economics Division,
1980 Key Business Ratios,
(All Rights Reserved).

By Leading State

Preliminary information on the number of plants (establishments), employment and shipments by states for the sporting and athletic goods industry and for the motorcycle and bicycle industry has been released by the Census Bureau based on the 1982 census of manufactures.

California accounted for 15.7% of 1982 sporting goods industry shipments, followed by Illinois, with 5.1%. Illinois accounted for 10.8% of motorcycle, bicycle industry shipments.

Sporting & Athletic Goods Manufacturers
By Leading States, 1982

	Establishments		Employees	Value of
	Total	With 20+ Employees	Total (Thous.)	Industry Shipments
Sporting & athletic goods (SIC 3949)				
U.S. total	1,514	451	47.5	$3,421.9
Leading states:				
California	275	82	7.2	536.7
Florida	86	25	1.9	96.8
Texas	81	20	na	(D)
Illinois	67	25	2.0	174.0
Michigan	66	20	2.1	80.4
New York	66	22	1.9	167.5
Wisconsin	66	22	1.6	108.3
Washington	65	23	1.7	118.8
Pennsylvania	55	15	1.6	145.6

(continued)

GENERAL INDUSTRY STATISTICS

By Leading State

Sporting & Athletic Goods Manufacturers
By Leading States, 1982
(continued)

	Establishments		Employees Total (Thous.)	Value of Industry Shipments
	Total	With 20+ Employees		
Motorcycles, bicycles & parts (SIC 3751)				
U.S. total	266	65	12.7	$1,214.6
Leading states:				
California	123	27	1.7	88.1
Illinois	13	5	1.3	131.1
Ohio	9	4	na	(D)
Tennessee	9	3	na	(D)
Massachusetts	5	2	na	(D)
Pennsylvania	5	2	na	(D)
Nebraska	3	3	na	(D)
Oklahoma	2	1	na	(D)

na = not available
(D) = Withheld to avoid disclosure

Source: U.S. Department of Commerce,
1982 Census of Manufactures,
Preliminary Report, Industry Series
MC82-I-39B-4(P); MC82-I-37C-4(P)

PRODUCTION/SHIPMENTS

Leading Manufacturers

The trade publication, SportStyle, compiles an annual list of the top companies in the business (The SportStyle 50). The listing for 1983 started with a volume of $45 million, while the lowest figure in the 1981 compilation was $24 million, reflecting the great growth in sports-related businesses (including footwear, apparel, etc., as well as equipment).

PRODUCTION/SHIPMENTS

Leading Manufacturers

The Top 50 Companies Based on U.S. Sales, 1983

	Company	Mil. $
1	Nike (adjusted for calendar year)	$ 744.6
2	General Mills (Izod, Footjoy)	430.0
3	AMF (sports products and bowling)	358.0
4	Adidas	350.0
5	Tultex (Sale Knitting Co.)	288.0
6	Spalding	275.0
7	Coleman	252.5
8	Ocean Pacific	244.0
9	Wilson	233.4
10	Bassett-Walker	222.0
11	Converse	190.0
12	Fuqua Industries (sporting goods)	188.0
13	Stride-Rite Corp. (Herman's, Keds, Sperry Top-sider)	180.0
14	Puma	168.0
15	Kidde	165.0
16	Champion (includes exports & franchise royalties)	155.0
17	Jantzen	150.0
18	Colgate-Palmolive (Bike, Etonic)	123.2
19	Diversified Products (division of Liggett Group)	120.0
20	Russell Corp. (Russell Athletic)	120.0
21	Woolrich	120.0
22	Figgie International (sporting goods div.)	118.9
23	Acushnet	115.0
24	Catalina	115.0
25	Pony	114.0
26	Bata	110.0
27	Danskin (division of Esmark)	110.0
28	Munsingwear (total sales)	93.0
29	HangTen	90.0
30	Warnaco (Speedo, Spalding, White Stag)	84.0
31	New Balance	81.0
32	Merona	80.0
33	KangaRoos	76.0
34	Daiwa	75.0
35	Pannill Knits (private label)	75.0
36	Pacific Trail	69.0
37	Stone Manufacturing	65.0
38	Prince (division of Chesebrough-Ponds)	64.2
39	Robert Bruce	60.0
40	Levi Strauss & Co.	60.0
41	Timberland	60.0
42	Kayser Roth (Interwoven, Burlington)	58.0
43	Nexus (Tropix)	58.0
44	Camel	55.0
45	Wenzel	55.0
46	Ballet Makers (Capezio)	50.0
47	Dunlop	50.0
48	Kransco (includes Whammo Div.)	50.0
49	MacGregor Golf	48.0
50	Adams-Millis (includes private label)	45.0

Source: SportStyle (August 6, 1984).

PRODUCTION/SHIPMENTS

Leading Manufacturers

The top five manufacturers listed below have been taken from a more detailed list compiled by SportStyle, based on 1983 sales. Sources are market estimates or statements from corporate officers.

	1983 Sales (millions)
WATERSPORTS APPAREL	
Ocean Pacific (includes licensed sales)	$ 244
Hang Ten	90
Hobie Sportswear	35
Off Shore	30
Laguna	20
WATERSPORTS EQUIPMENT	
Kransco (includes Whamo Div.)	50
Hobie Cat/O'Brien (Coleman Div.)	40
O'Neill	20
Windsurfing International	15
Connelly	10.5
COMPETITIVE SWIMWEAR	
Speedo (All apparel divisions)	34
Arena	12.5
The Finals	6.8
Hind-Wells	3.0
Gulbenkian	1.5
COMPETITIVE RUNNINGWEAR	
Dolfin	12.5
Bill Rodgers & Co.	8.5
Sub-4	8.3
Moss Brown & Co.	7.5
Women On The Run	4.3
SKI APPAREL	
Sport Obermeyer	26
Roffe	23
CB Sport	20
Allen-A	17.5
White Stag (ski wear only)	15.5
ALPINE SKI	
Rossignol	26.0
Olin	15.0
Dynastar	14.5
K2	14.0
Atomic	10.5
GOLF EQUIPMENT	
Spalding	135
Acushnet	115
Wilson	92.6
Dunlop (includes sales of tennis products)	50.0
MacGregor	48

(continued)

PRODUCTION/SHIPMENTS

Leading Manufacturers

	1983 Sales (millions)
TENNIS RACQUETS & BALLS	
Prince (includes overseas sales)	64.2
Penn Athletic (includes sales of tennis balls only)	35
AMF/Head	20
Pro Kennex	10
Donnay	8.5
HOME EXERCISE EQUIPMENT	
Diversified Products	120
Huffy	26
AMF Whitely	20
Amerec	16.5
Vitamaster	15
OUTDOORS EQUIPMENT	
Coleman	252.5
Kellwood Corp.	60
Camel	55
Johnson Camping	25
Henderson	24
TEAM EQUIPMENT	
Rawlings	65
MacGregor	34
Hillerich & Bradsby	15.4
Riddell	14
Hutch/Reach	12
ATHLETIC FOOTWEAR	
Nike	636.6
Adidas	210
Converse	205
Puma	125
Pony	114
TEAM APPAREL	
Russell Athletic	120
Champion	105
Bike	58.2
DeLong	22.5
Medalist	21.0
BODYWEAR	
Danskin (includes general activewear)	110
Ballet Makers (Capezio) (includes footwear)	50
Flexatard	22
Carushka	12
Softouch	8.2
GENERAL ACTIVEWEAR	
Izod	360
Tultex	288
Bassett-Walker	222
Jantzen	150
Catalina	115

(continued)

PRODUCTION/SHIPMENTS

Leading Manufacturers

	1983 Sales (millions)
RUGGED OUTERWEAR	
Woolrich	$ 120
Pacific Trail	69
The North Face	32
JanSport	30
Columbia	15

Source: Selected list from SportStyle (Fairchild Publications), August 6, 1984

Sporting & Athletic Goods

Shipments of sporting goods and athletic equipment benefited from the overall economic recovery in 1983. According to the U.S. Bureau of Industrial Economics, the constant-dollar value of shipments of sporting goods and athletic equipment by all producers gained 5.3% compared with 1982. (This is a measurement of real gain, eliminating the effects of inflation). This follows a 2.1% decline in constant dollar terms in shipments in 1982 compared with 1981.

The sporting goods industry is composed of many diverse segments producing a wide variety of products. Preliminary data on the quantity and value of shipments by all U.S. producers in 1982, based on the census of manufactures, compared with 1977 (when the previous census was compiled), are covered in the following tables.

Quantity of Shipments of Selected Sporting & Athletic Goods by All Producers, 1977, 1982
(Thousands of units, unless specified)

	1982	1977	% Change 1982/1977
Fishing rods	6,919.1	8,052.0	- 14.1%
Fishing reels	3,642.6	11,055.0	- 67.1
Fishing rod & reel combinations	5,353.8	(D)	na
Golf balls (1,000 doz.)	24,062.9	16,797.0	+ 43.3
Golf clubs:			
Irons	8,043.1	10,125.0	- 20.5
Woods	3,715.0	4,032.0	- 7.9
Golf bags	1,085.0	1,432.0	- 24.2
Baseball mitts & gloves	64.5	52.0	+ 24.0
Baseball bats	378.4	553.0	- 31.6
Exercise cycles	1,316.8	na	na

(continued)

PRODUCTION/SHIPMENTS

Sporting & Athletic Goods

Quantity of Shipments of Selected Sporting & Athletic Goods by All Producers, 1977, 1982

(Thousands of units, unless specified)

	1982	1977	% Change 1982/1977
Footballs (1,000 doz.)	497.6	400.0	+ 24.4%
Soccer balls (1,000 doz.)	49.8	na	--
Bowling balls (1,000 doz.)	1,945.5	2,599.0	- 25.1
Inflatable athletic balls (other than footballs, soccerballs, etc.) (1,000 doz.)	561.4	na	--
Tennis rackets (strung & unstrung)	3,924.6	3,409.0	+ 15.1
Ice skates	457.8	1,484.0	- 69.2
Water skis	417.4	559.0	- 25.3

(D) = Withheld to avoid disclosure
na = not available

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Preliminary Report, Industry Series
MC82-I-39B-4(P)

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982

(Millions of Dollars)

	1982	1977	% Change 1982/1977	% of Total 1982
Sporting & Athletic Goods, total	$3,166.5	$2,216.9	+ 42.8%	100.0%
Fishing tackle & equipment	313.8	270.1	+ 16.2	9.9
Glass fishing rods	33.2	48.2	- 12.7	1.0
Graphite metal fishing rods	8.9			
Other fishing rods	2.2	3.8	- 42.1	0.1
Fishing reels	49.8	63.4	- 21.5	1.6
Fish hooks, including snelled	24.4	15.3	+ 59.4	0.8
Casting plugs, spinners & spoons, flies, lures & similar artificial baits	64.4	49.2	+ 30.9	2.0
Tackle boxes	12.9	25.3	- 49.0	0.4
Fishing rod & reel combinations	59.6	64.6	+ 89.6	2.0
All other fishing equipment	62.9			

(continued)

PRODUCTION/SHIPMENTS

Sporting & Athletic Goods

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982

(Millions of Dollars)
(continued)

	1982	1977	% Change 1982/1977	% of Total 1982
Playground, gymnasium & gymnastic equipment	$ 523.8	$ 257.8	+103.1%	16.5%
Home playground equipment, incl. swing sets, slides, seesaws, sandboxes, etc.	78.1	57.2	+ 36.2	2.5
Institutional playground equip., incl. swing sets, slides, seesaws, etc.	57.8	35.3	+ 63.7	1.8
Gymnasium & gymnastic apparatus & equip.	53.3	56.7	- 6.0	1.7
Health, physical fitness & exercise equip.	130.5	98.6	+237.9	4.1
Weight lifting equipment	121.5			3.8
Exercise cycles	81.2			2.6
Playground, gymnasium & gymnastic equip. n.s.k.	1.4	9.9	- 85.9	0.1
Other Sporting & Athletic Goods	1,359.8	1,060.8	+ 28.2	42.9
Billiard & pool tables	55.6	52.9	+ 5.1	1.8
Billiard & pool supplies	9.8	6.8	+ 44.1	0.3
Bowling alleys & bowling pin setters	16.3	1.5*	(X)	0.5
Bowling alley playing supplies:				
Bowling balls	36.7	34.6	+ 6.1	1.2
Other bowling alley supplies	80.9	66.1	+ 22.4	2.6
Baseballs	21.1	11.7	- 12.1	0.7
Softballs		12.3		
Baseball mitts & gloves	25.3	12.2	+107.3	0.8
Baseball bats, incl. softball:				
Wood	30.3	10.5	+ 28.9	1.0
Metal		13.0		
Soccer balls	2.5	**	na	0.1
Footballs	28.6	21.7	+ 31.8	0.9
Basketballs	16.2	30.7	- 47.2	0.5
Inflatable athletic balls other than basketballs & footballs	7.8	19.0	- 58.9	2.5
Shoe & rink roller skates	57.0	40.2	+ 41.8	1.8
Wooden & plastic skateboards, incl. complete sets	3.7	49.5	- 92.5	0.1
Ice skates	13.6	21.4	- 36.4	0.4
Snow skis	37.5	42.5	- 11.8	1.2
All other winter sports equipment	23.1	35.8	- 35.5	0.7
Surfboards	2.1	20.2	+ 65.3	0.1
Water skis	32.3			1.0

(continued)

Sporting & Athletic Goods

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982
(Millions of Dollars)
(continued)

	1982	1977	% Change 1982/1977	% of Total 1982
Underwater sports equipment & sail boards	$ 78.6	$ 36.8	+113.6%	2.5
Lawn tennis equipment:				
Rackets, all types	163.5	52.6	+210.8	5.2
Tennis balls	97.4	63.1	+ 18.1	3.1
All other tennis equip. & accessories		19.4		
Racquetball rackets	30.9	***	na	1.0
Archery equipment	69.8	63.7	+ 9.6	2.2
Football protective equipment	20.7	29.8	- 30.5	0.7
Body protective equipment, of all types	41.1	15.8	+160.1	1.3
Football, baseball & soccer equip., n.e.c.	31.2	26.0	+ 20.0	1.0
Wading & above ground pools, under 15 ft. in diameter, not filtered, including plastics & metal	71.7	13.4	+435.1	2.3
Above ground swimming pools, 15 ft. in diameter & over, filtered (completely manufactured)	37.2	46.3	- 19.7	1.2
Other sporting & athletic equipment	217.3	191.3	+ 13.6	6.7

n.s.k. = not specified by kind
n.e.c. = not elsewhere classified
na = not available
* = did not include pin setters in 1977
** = included in inflatable athletic balls in 1977
*** = included in other sporting & athletic equipment in 1977.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Preliminary Report, Industry Series
MC82-I-39B-4(P)

Bicycles, Motorcycles, Mopeds

The constant-dollar value of total shipments of motorcycles, bicycles and parts by all U.S. producers was up an estimated 12.6% over 1982, according to the U.S. Bureau of Industrial Economics, following a decline of more than 13% in the previous year. Following the worst year since 1969--1982--product shipments of bicycles and parts rebounded 16% in current dollars to an estimated $723 million.

Manufacturers have pared down inventories of bicycles and the largest manufacturer closed plants, concentrating production in one plant in Ohio. Lightweight 10-speed bicycles have become increasingly important, but BMX types have also increased in demand in recent years, and made up 37% of the market in 1982 vs. 53% in domestically produced lightweights. A new entrant in the market, the "mountain bike" is also gaining in popularity.

PRODUCTION/SHIPMENTS

Bicycles, Motorcycles, Mopeds

Quantity & Value of Shipments of Motorcycles, Bicycles & Parts, 1977, 1982
(Quantity in thousands; Value in millions of dollars)

	Quantity		Value	
	1982	1977	1982	1977(r)
Motorcycles, bicycles, parts, total	--	--	$ 992.8	$ 847.3
Bicycles, adult tricycles, unicycles; children's 2-wheel sidewalk cycles	--	--	565.1	490.4
Bicycles, complete, with 1 or both wheels 25 inches or more				
Single speed	243.1	834.1	15.9	38.3
Three speed	573.2	744.7	35.6	40.9
Five speed	*	105.7	*	8.7
Ten speed	2,182.5	2,102.8	153.1	153.2
Over ten speed	353.0		34.1	
Bicycles, complete, with both wheels less than 25 inches	3,244.5	3,411.4	206.1	152.7
Other, incl. unicycles & adult tricycles	74.1	150.9	21.1	12.0
Bike parts & type not specified	--	--	99.2	84.5
Motorcycles, motorbikes, mopeds, scooters, trail vehicles & parts	--	--	373.0	286.1
Type not specified		--	54.7	70.7

* Combined with data on over 10 speed

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Preliminary Report, Industry Series MC82-1-37C-4(P)

Activewear

Current information on U.S. production and value of shipments of major types of active sportswear for men and women is published by the U.S. Bureau of the Census in the Current Industrial Reports series.

PRODUCTION/SHIPMENTS

Activewear

Production & Value of Shipments of Active Sportswear, 1982, 1981
(Quantity in 1,000 dozens; Value in millions of dollars)

	Quantity			Value		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Men's & boys':						
Athletic shorts, incl. jogging shorts & tennis shorts	4,631	4,625	+ 0.1%	157.6	156.7	+ 0.6%
Sweatshirts	6,935	4,818	+ 43.9	345.9	269.8	+ 28.2
Sweat pants	2,206	1,888	+ 16.8	127.4	100.0	+ 27.4
Warm-up or jogging suits	1,323	1,316	+ 0.5	118.3	105.5	+ 12.1
Swimwear, total	1,573	1,920	- 18.1	97.3	117.8	- 17.4
Woven	1,094	1,373	- 20.3	na	na	--
Knit	216	228	- 5.3	na	na	--
Not specified	263	319	- 17.6	na	na	--
Team sports uniforms, total	1,195	1,193	+ 0.2	81.1	79.6	+ 1.9
Softball & baseball	476	453	+ 5.1	36.4	36.3	+ 2.8
Football	346	379	- 8.7	22.5	22.4	+ 0.4
Basketball	315	330	- 4.5	18.8	19.0	- 1.1
Other	58	31	+ 87.1	3.4	1.9	+ 78.9
Ski jackets, incl. vests	108	112	- 3.6	50.5	52.9	- 4.5
Ski pants	16	19	- 15.8	8.9	10.3	- 13.6
Women's, misses' & juniors':						
Athletic shorts, incl. jogging shorts, tennis skirts, etc.	929	822	+ 13.0	52.9	49.8	+ 6.2
Sweatpants	79	na	--	5.4	na	--
Warm-up or jogging suits	1,909	1,399	+ 36.5	143.6	110.0	+ 30.5
Swimsuits, total	3,052	3,191	- 4.4	409.8	406.7	+ 0.8
Woven	589	466	+ 26.4	na	na	--
Knit	1,913	2,168	- 11.8	na	na	--
Not specified	550	557	- 1.3	na	na	--
Ski jackets, incl. vests	50	66	- 24.2	29.6	33.6	- 11.9
Ski pants	14	18	- 22.2	7.9	6.9	+ 14.5
Team sports uniforms	574	384	+ 49.5	35.9	23.4	+ 53.4

na = not available
(D) = withheld to avoid disclosure

Source: U.S. Bureau of the Census,
Current Industrial Reports (MA-23E & F(83)-1).

PRODUCTION/SHIPMENTS

Athletic Footwear

After a steep 6.6% decline in athletic footwear production between 1981 and 1982, preliminary data for 1983 indicates that although the decline continued, it has slowed somewhat. The U.S. Department of Commerce reported that 16.4 million pairs of athletic footwear were produced in 1983 compared with 16.6 million in 1982 and 17.8 million in 1981.

Production of Athletic Shoes for Men, Women & Children, 1980-1982
(Quantity in thousands of pairs)

	1982	1981	1980	% Change 1982/1981
Athletic shoes, total	16,648	17,831	15,038	- 6.6%
By type:				
Designed for sport	6,474	7,674	4,451	- 15.6
All others (joggers, etc.)	10,174	10,157	10,587	+ 0.2
Up to size 3	1,191	1,543	1,902	- 22.8
Size 3 & over	8,983	8,614	8,685	+ 4.3
By construction:				
Cemented, incl. sliplasted	7,082	7,774	10,101	- 8.9
Welt, incl. silhouwelt	(D)	(D)	(D)	na
Injection molded	8,897	8,935	4,112	- 0.4
All other construction	(D)	(D)	(D)	na

D = Withheld to avoid disclosure
na = not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Footwear, MA-31A(82)-1, MA31A(81)-1

While production of athletic footwear registered a decline of 6.6% in 1982, the quantity of shipments registered a decline of only 0.2%. However the value of shipments showed a gain during this period, climbing to a total of $226.1 million in 1982, 5.5% better than the total registered in the previous year.

Quantity & Value of Shipments of Athletic Footwear, 1981, 1982
(Quantity in 1,000 pairs; Value in millions of dollars)

	Quantity		% Change	Value		% Change
	1982	1981	1982/1981	1982	1981	1982/1981
Athletic footwear (men's, women's & children's)	17,188	17,221	- 0.2%	$226.1	$214.4	+ 5.5%

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Footwear MA31A(82)-1

PRODUCTION/SHIPMENTS

Athletic Footwear

Distribution of Production of Athletic Footwear by Months, 1981-1983

	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1983(p)	100.0%	9.5%	12.3%	11.7%	10.4%	10.3%	8.1%	4.5%	6.8%	5.4%	6.7%	6.8%	7.5%
1982	100.0	8.8	9.0	9.7	8.5	8.2	7.8	4.7	9.0	8.4	9.5	8.0	8.4
1981	100.0	9.1	8.6	9.3	9.9	8.8	9.0	6.6	8.4	7.7	8.6	6.8	7.2

(p) = preliminary

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Footwear, MA31A(82)-1.

PRODUCER PRICE TRENDS

Sporting goods and athletic goods priced at the factory level have been edging down in recent months. As of May 1984, the index registered 0.2% below the index in May 1983. For the year 1982 compared with 1981, producer prices for sporting goods were up 4.4%.

Factory prices on all athletic footwear in May 1984 compared with a year earlier were up 2.6%; types designed for sports were up 4.2% in price compared with May 1983.

Producer Price Indexes for Specified Types of Sporting Goods & Activewear, 1981-1984
(1967 = 100, unless otherwise noted)

					% Change	
	May		Annual Average		May	Year
	1984	1983	1982	1981	1984/1983	1982/1981
Athletic footwear (June 1980=100)	104.1	101.5	102.5	98.6	+ 2.6%	+ 4.0%
Designed for sports	115.2	110.6	--	105.7	+ 4.2	--
Sporting goods & athletic goods	206.1	206.5	204.9	196.2	- 0.2	+ 4.4
Golf balls	na	na	91.0	88.6	--	+ 2.7
Golf clubs, iron	na	na	123.6	122.8	--	+ 0.7
Golf clubs, wood	na	na	127.5	125.2	--	+ 1.8
Baseball gloves	164.6	192.8	190.6	191.9	- 1.5	- 0.7
Footballs	na	na	208.7	193.2	--	+ 8.0
Bowling balls	182.8	177.2	172.3	160.7	+ 3.2	+ 7.2
Bicycles	270.7	271.1	269.2	248.8	- 0.1	+ 8.2

na = not available

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Foreign Trade is one of the areas of the sports/fitness market which is of major concern to the industry. The U.S. Bureau of Economic Analysis reports in the 1984 Industrial Outlook that imports of sporting and athletic goods reached a total of $770 million in 1983 and a rise to $866.3 million is estimated for 1984. This would mark an increase of 12.5% for imports, while exports are only expected to rise 7.0%, to $396.6 million.

The trend is not expected to hold over into the motorcycle, bicycle and parts segment, however. The Bureau of Economic Analysis estimates that in 1984 imports in this segment will rise only 2.5% to $1,025.0 million while an increase of 10.0%, to $118.7 million is expected in exports. It must be noted, however, that imports share of the market is much higher in this segment of the industry than in the sporting goods segment (49.4% vs. 20.8%).

Summary of Foreign Trade in 1983 & Impact on Industry

	Sporting & Athletic Goods	Motorcycles, Bicycles, Parts, etc.
Value of product shipments (mil. $)	$3,311.0	$1,132.0
Value of exports (mil. $)	385.0	107.0
Value of imports (mil. $)	770.0	1,000.0
Exports as a % of shipments	11.6	9.5
Imports as a % of new supply*	18.9	46.9
Imports as a % of apparent consumption**	20.8	49.4

* new supply is the sum of product shipments plus imports
**Apparent consumption is the sum of product shipments plus imports less exports

Source: U.S. Bureau of Industrial Economics
1984 Industrial Outlook

Imports

Imports are a growing concern in the sporting goods industry. According to the U.S. Department of Commerce (1984 Industrial Outlook), imports of sporting goods overall increased a total of 11% in 1983 and accounted for nearly 21% of apparent U.S. consumption. This compares with an estimated 20% of apparent consumption which imports captured in 1982.

Government sources report that three Asian countries (Taiwan, Korea and Japan) represent 61% of sporting goods imports. While Taiwan and Korea tend toward low-end, labor-intensive goods, the Japanese are producing higher-quality, higher-priced goods.

Individual categories which showed large gains in import penetration in 1983 include golf equipment, tennis rackets, squash rackets, snow skis and equipment, basketballs and exercise equipment.

In the bicycle segment of the industry, which is generally assumed to be import sensitive, domestic manufacturers fared rather well. Imports as a percent of apparent consumption rose from 26% in 1982 to 28% in 1983. In the bicycle parts area however, import penetration rose to nearly 50% in 1983.

FOREIGN TRADE

Imports

Imports of Specified Types of Sporting & Athletic Goods, 1982, 1983

	Value (C.I.F.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Bagatelle, billiard & pool equip. (exc. tables) & parts	$ 6.7	$ 8.0	- 16.3%	--	--	--
Table tennis equip. (exc. tables) & parts	3.2	3.4	- 5.9	--	--	--
Tables designed for games	1.6	0.9	+ 77.8	--	--	--
Fishing equipment, total	160.5	162.7	- 1.3	--	--	--
Snelled fish hoods	1.6	2.4	- 33.3	--	--	--
Fish hooks other than snelled	8.0	8.0	--	--	--	--
Artificial baits & flies	12.4	11.9	+ 4.2	80,954.1	114,523.9	- 29.3%
Fishing rods	43.4	43.7	- 0.7	10,889.6	10,975.9	- 0.8
Parts for fishing rods	4.3	4.8	- 10.4	--	--	--
Fishing reels	70.9	72.0	- 1.5	9,824.8	10,286.0	- 4.3
Parts of fishing reels	1.6	1.2	+ 33.3	--	--	--
Sport fishing tackle & equipment & parts, n.e.c.	18.3	18.7	- 2.1	--	--	--
Golf equip., total	73.5	64.0	+ 14.8	--	--	--
Golf balls	1.8	1.2	+ 50.0	3,565.5	4,779.7	- 25.4
Golf clubs	7.3	3.9	+ 87.1	454.7	237.5	+ 91.4
Parts for golf clubs	30.1	19.3	+ 56.0	--	--	--
Golf gloves	26.0	34.5	- 24.6	9,712.3	12,046.7	- 19.4
Golf equip. & parts, n.e.c.	8.3	5.1	+ 62.7	--	--	--
Bicycles, having both wheels over 25 inches	149.0	98.0	+ 52.0	1,739.1	1,034.8	+ 68.1
Parts for bicycles, n.e.c.	137.9	89.3	+ 54.4	--	--	--
Lawn tennis equip., total	66.6	50.5	+ 31.9	--	--	--
Lawn tennis balls	0.7	1.3	- 46.2	1,533.6	2,287.4	- 33.0
Lawn tennis racquets, strung or not strung	54.0	40.2	+ 34.3	3,743.3	3,656.8	+ 2.4
Lawn tennis equip. & parts, n.e.c.	11.9	9.0	+ 32.2	--	--	--
Baseball equip., total	94.0	103.3	- 9.0	--	--	--
Baseballs & softballs	45.8	46.9	- 2.3	31,652.4	31,546.3	+ 0.3
Gloves & mitts for baseball & softball	38.2	45.7	- 16.4	4,794.0	5,693.6	- 5.8
Baseball equip. (exc. balls & gloves) & parts, n.e.c.	10.0	10.7	- 6.5	--	--	--
All other balls, total	51.5	42.8	+ 20.3	--	--	--
Basketballs	15.4	10.7	+ 43.9	4,094.6	2,568.2	+ 59.4
Footballs	3.6	4.2	- 14.3	1,500.0	1,339.5	+ 12.0
Soccer & polo balls	16.1	12.8	+ 25.8	3,911.4	2,908.2	+ 34.4
Bowling balls	0.3	0.8	+ 62.5	1.6	28.4	- 94.4
Balls for games & sports, n.e.c.	16.1	14.3	+ 12.6	--	--	--

(continued)

FOREIGN TRADE

Imports

Imports of Specified Types of Sporting & Athletic Goods, 1982, 1983

	Value (C.I.F.*) (Millions of Dollars)			Quantity (Thousands of Dollars)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Skates (roller & ice), total	$ 21.9	$ 21.6	+ 1.4%	--	--	--
Roller skates (incl. footwear with skates permanently attached) & parts	9.6	7.7	+ 24.7	--	--	--
Ice skates permanently attached to footwear	10.4	11.0	- 5.5	446.0	391.1	+ 14.0%
Ice skates not permanently attached to footwear	0.8	0.3	+166.7	8.8	3.3	+166.7
Ice skate blades & other parts	1.1	2.6	- 57.7	--	--	--
Ski & allied equip., total	92.1	74.1	+ 24.2	--	--	--
Snow skis	42.4	30.2	+ 40.4	833.2	573.4	+ 45.3
Tobbogans	1.2	2.0	- 40.0	144.8	127.3	+ 13.7
Ski equip. (water ski, bindings, poles, etc.) n.e.c.	48.5	41.9	+ 15.8	--	--	--
Hockey equip. (exc. skates) & parts	18.0	17.2	+ 4.7	--	--	--
Archery equip. & parts	2.2	1.7	+ 29.4	--	--	--
Playground, gymnasium, gymnastic & exercise equip., n.e.c.	85.7	46.3	+ 85.1	--	--	--
Game, sport, or athletic equip., n.e.c.	133.1	80.7	+ 64.9	--	--	--

n.e.c. = not elsewhere classified

*The CIF value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price, including all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Note: Data on imports of activewear is not available separately from general-use apparel for the most part, and therefore not included in the above table. For athletic footwear, see the FOOTWEAR FACT FILE.

Source: U.S. Bureau of the Census,
U.S. General Imports,
(FT 135, December 1982, 1983).

FOREIGN TRADE

Exports

Exports are seen as one of the biggest growth areas for the sporting goods industry in the future. One of the major reasons for this optimism is the recent agreement with Japan lifting many of the barriers to exports to that country. In 1982, Japan alone accounted for almost one-third of U.S. exports.

Exports accounted for approximately 12% of domestic shipments in 1983, according to the 1984 U.S. Industrial Outlook, relatively even with the total of the year before. This bodes well for U.S. manufacturers as 1983 was a difficult year for exports due to an unusually strong U.S. dollar vs. other foreign currencies, making U.S.-made products relatively more expensive.

Exports by individual product were a mixed bag in 1983, with some showing large increases while others registered declines. Major increases in 1983 were recorded by golf equipment and exercise equipment both up by better than 10%. Offsetting these gains were the declines recorded by fishing equipment, roller skates and baseballs.

In the bicycle segment of the industry, exports represented 9.5% of domestic shipments in 1983, down from the 9.8% registered in 1982.

Summary of U.S. Exports of Sporting & Athletic Goods, 1982, 1983

	Value (F.A.S.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Bagatelle, billiard & pool equip. (exc. tables) & parts	$ 0.9	$ 1.2	- 25.0%	--	--	--
Billiard & pool tables	2.3	3.4	- 32.4	4.9	7.0	- 30.0%
Tables designed for games other than billiards & pool	0.6	1.0	- 40.0	--	--	--
Fish hooks, incl. snelled & artificial baits & flies	4.5	3.9	+ 15.4	--	--	--
Fishing rods	1.9	1.6	+ 18.8	126.6	85.4	+ 48.2
Fishing reels	2.5	2.7	- 7.4	116.1	128.2	- 9.4
Sport fishing equip. (incl. baskets & creels) n.e.c.	13.1	14.8	- 11.5	--	--	--
Archery equip. & parts	5.2	5.8	- 10.3	--	--	--
Baseball & softball equip. (incl. balls, bats, gloves, mitts, etc.)	23.5	25.2	- 6.7	--	--	--
Golf balls	25.8	28.5	- 9.5	46,065.1	45,227.6	+ 1.9
Golf clubs	59.2	64.5	- 9.8	2,073.7	2,432.7	- 14.8
Parts of golf clubs	30.2	24.4	+ 23.8	--	--	--
Golf equip. (incl. gloves, tees, golfball parts, etc.) n.e.c.	11.9	11.0	+ 8.2	--	--	--

(continued)

FOREIGN TRADE

Exports

Summary of U.S. Exports of Sporting & Athletic Goods, 1982, 1983
(continued)

	Value (F.A.S.*) (Millions of Dollars)			Quantity (Thousands of Dollars)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Hockey equip. (exc. skates) & parts	$ 1.1	$ 1.4	- 21.4%	--	--	--
Lawn tennis balls	12.3	7.5	+ 64.0	10,622.5	5,465.4	+ 94.4%
Lawn tennis racquets, strung or not strung	20.7	26.7	- 22.5	699.7	911.9	+ 23.3
Lawn tennis equip., n.e.c.	9.0	9.3	- 3.2	--	--	--
Roller skates (incl. footwear with skates permanently attached) & parts	2.0	3.3	- 39.4	--	--	--
Snow skis	14.2	15.7	- 9.6	207.9	174.9	+ 18.9
Water skis	2.4	3.5	- 31.4	27.3	37.6	- 27.4
Snow equip. (incl. snow shoes, sleds, tobbogans, etc.) & parts, n.e.c.	2.5	4.0	- 37.5	--	--	--
Basketballs	1.4	2.1	- 33.3	177.2	271.2	- 34.7
Inflatable balls (incl. footballs, soccer, volley, etc.) n.e.c.	1.3	1.8	- 27.7	262.5	432.9	- 39.4
Non-inflatable balls for games & sports, n.e.c.	2.6	3.2	- 18.8	--	--	--
Bowling balls	3.3	2.6	+ 26.9	120.8	108.4	+ 11.4
Bowling equip. (exc. balls & alleys) & parts, n.e.c.	24.1	22.3	+ 8.1	--	--	--
Playground, gymnastic, gymnasium & exercise equipment	34.2	31.5	+ 8.6	--	--	--
Skateboards	0.1	0.1	--	5.8	6.0	- 3.3
Skateboard decks	#	#	--	0.1	0.1	--
Skateboard parts (exc. decks), n.e.c.	2.9	4.6	- 37.0	--	--	--

(continued)

FOREIGN TRADE

Exports

Summary of U.S. Exports of Sporting & Athletic Goods, 1982, 1983
(continued)

	Value (F.A.S.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1983	1982	% Change 1983/1982	1983	1982	% Change 1983/1982
Bicycles with at least one wheel over 25 inches	$ 0.5	$ 0.8	- 37.5%	5.7	11.4	- 50.0%
Parts for bicycles	10.4	7.9	+ 31.6	--	--	--
Game, sport, or athletic equip., n.e.c. (incl. ice skates, boxing gloves, etc.)	27.5	34.0	- 19.1	--	--	--

# = Less than $500,000
n.e.c. = not elsewhere classified
na = not available
* The export value is generally equivalent to the f.a.s. (free alongside ship) value at the U.S. port of export, based on the transaction price, including inland freight, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Note: Data on exports of activewear is not available separately from general-use apparel for the most part, and therefore not included in the above table.

Source: U.S. Bureau of the Census,
U.S. Exports, (FT 410), December 1982
U.S. Exports, (FT 446), December 1983

AT THE RETAIL LEVEL

CONSUMER MARKETS

Several factors are expected to aid in the continuation of the climb in sales of sporting and fitness equipment. The most important of these factors is the rise in real personal disposable income. This rise has continued well into 1984 and is expected to continue. Some economists estimate that the rise could be as much as 20% by 1986. With the sports/fitness/leisure markets extremely income sensitive, this rise bodes well for the industry.

Another important factor in the growth of the sports/fitness industry is the increased interest in fitness by women and older people. As the number of people with interest in active sports grows, so shipments of sports equipment and apparel are also expected to grow.

CONSUMER MARKETS

Market prospects are also enhanced by current demographic trends. The fastest growing segment of the population between 1984 and 2005 is expected to be the 35 - 54 year old bracket. These people are generally the group most interested in sports participation, fitness, and fashionable sportswear. As this group, which is in its prime earning years, grows so are sales of sporting goods expected to grow.

Currently, the 35 - 54 year bracket represents 22.4% of the U.S. population. By 2005, this group is expected to grow to 29.9% of the total.

With the generally accepted income-sensitivity of the sporting goods market, the influx of women into the work force is also aiding the boost in sales. As more and more women either join or return to the labor force, the median household income has risen dramatically. With less free time, these women are buying more fitness equipment for their homes so as to more easily stay in condition.

The Size of the Potential Market

Population Projections - 1984, 1994, 2005
(Middle Series*)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Male							
Total, all ages	115,073	125,464	134,297	+ 16.7%	100.0%	100.0%	100.0%
Under 5 years	9,329	9,635	8,931	- 4.3	8.1	7.7	6.6
5 to 9 years	8,296	9,866	9,094	+ 9.6	7.2	7.9	6.8
10 to 15 years	10,708	11,245	11,698	+ 9.2	9.3	9.0	8.7
16 years & over	86,742	94,718	104,574	+ 20.5	75.4	75.4	77.9
16 - 19	7,653	6,712	8,058	+ 5.3	6.6	5.3	6.0
20 - 34	31,522	29,725	27,416	- 13.0	27.4	23.7	20.4
35 - 54	25,975	35,187	40,769	+ 56.9	22.6	28.0	30.4
55 - 64	10,375	9,793	14,060	+ 35.5	9.0	7.8	10.5
65 & over	11,217	13,300	14,271	+ 27.2	9.7	10.6	10.6
Median age (years)	29.9	33.0	36.0	+ 20.4	--	--	--
Female							
Total, all ages	121,343	132,251	141,381	+ 16.5	100.0	100.0	100.0
Under 5 years	8,904	9,188	8,518	- 4.3	7.3	6.9	6.0
5 to 9 years	7,924	9,415	8,678	+ 9.5	6.5	7.1	6.1
10 to 15 years	10,236	10,745	11,167	+ 9.1	8.4	8.1	7.9
16 years & over	94,279	102,903	113,018	+ 19.9	77.7	77.9	80.0
16 - 19	7,357	6,426	7,707	+ 4.8	6.1	4.9	5.5
20 - 34	31,205	29,068	26,706	- 14.4	25.7	22.0	18.9
35 - 54	27,115	36,202	41,249	+ 52.1	22.3	27.4	29.2
55 - 64	11,834	11,002	15,399	+ 30.1	9.8	8.3	10.9
65 & over	16,768	20,205	21,957	+ 30.9	13.8	15.3	15.5
Median age (years)	32.4	35.6	39.2	+ 21.0	--	--	--

(continued)

The Size of the Potential Market

Population Projections - 1984, 1994, 2005
(Middle Series*)
(continued)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Total, male & female							
Total, all ages	236,416	257,714	275,677	+ 16.6	100.0%	100.0%	100.0%
Under 5 years	18,232	18,823	17,449	- 4.3	7.7	7.3	6.3
5 to 9 years	16,219	19,281	17,772	+ 9.6	6.9	7.5	6.5
10 to 15 years	20,944	21,991	22,865	+ 9.2	8.9	8.5	8.3
16 years & over	181,021	197,619	217,591	+ 20.2	76.5	76.7	78.9
16 - 19	15,009	13,138	15,765	+ 5.0	6.3	5.1	5.7
20 - 34	62,726	58,792	54,122	- 13.7	26.5	22.8	19.6
35 - 54	53,090	71,389	82,018	+ 54.5	22.4	27.7	29.7
55 - 64	22,210	20,793	29,459	+ 32.6	9.4	8.1	10.7
65 & over	27,986	33,507	36,227	+ 29.4	11.8	13.0	13.1
Median age (years)	31.1	34.3	37.6	+ 20.9	--	--	--

*Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census,
Current Population Reports
Series P-25, No. 952 (May 1984)

During the 1970's the nation's household population grew at a rate of less than 1% a year, but real disposable income grew by better than 3%. The number of households with annual earnings of $35,000 or more (measured in constant 1982 dollars) rose some two and a half times faster than the nation's total household count.

During the 1980's the number of households in the upper brackets will grow even faster, as the baby boom generation reaches the age of peak earning power. By contrast, in the preceding 10 years the young adult population just entering the labor force and relatively low incomes was growing the fastest.

The Consumer Research Center of The Conference Board and the U.S. Bureau of the Census have issued a report on a joint study of the discretionary income market--households where spendable income exceeded the average spendable income of "similar" households by 30% or more. The amount by which it exceeded that level was defined as discretionary income. "Similar" households were considered to be

The Size of the Potential Market

units of identical size, of about the same age, and located in the same type of communities. According to this definition, slightly over 25 million households (21% of the total) had some discretionary income in 1980. Total discretionary income was $193 billion--representing about 14% of the total after-tax income of the nation's households and 28% of the total for households with at least some discretionary income.

Total Households & Households With Discretionary Income, 1980
By Age of Head

				Households With Discretionary Income			
	Total Hhlds. (thous.)	After Tax Income Aggregate (billions)	Average	Total No. (thous.)	% of All Hhlds.	Spendable Discret. Income Aggregate (billions)	Average
Total	82,368	$1,340.4	$16,272	25,292	30.7%	$193.3	$7,644
Age of Householder							
Under 25 years	6,443	74.6	11,584	1,170	18.2	5.4	4,612
25 to 29 years	9,514	142.7	15,002	2,633	27.7	14.2	5,383
30 to 34 years	9,639	163.5	16,959	3,017	31.3	19.4	6,433
35 to 39 years	7,969	150.5	18,884	2,466	30.9	18.9	7,646
40 to 44 years	6,494	132.0	20,334	2,175	33.5	18.3	8,429
45 to 49 years	6,209	133.9	21,566	2,216	35.7	20.3	9,177
50 to 54 years	6,486	132.5	20,423	2,455	37.8	21.6	8,810
55 to 59 years	6,742	128.9	19,123	2,662	39.5	23.9	8,963
60 to 64 years	5,962	96.0	16,098	2,111	35.4	17.8	8,428
65 years & over	16,912	185.7	10,981	4,388	25.9	33.6	7,646

Source: The Conference Board & the U.S. Bureau of the Census. A Marketer's Guide to Discretionary Income (Nov. 1983)

Sports Participation & Attendance

The most comprehensive study on sports participation in the United States is the A.C. Neilson study covering the year 1982. This study--one of a series conducted every three years--found that between 1979 and 1982, snow skiing was the fastest growing sport, as far as participation, with an increase of 26.6%. Soccer was found to have the second highest percentage increase in participation with an increase of 23.0%.

Swimming remained the most popular sport participated in in 1982 with bicycling rating a distant second.

CONSUMER MARKETS

Sports Participation & Attendance

Participation in Selected Sports, 1976, 1979, 1982
(Thousands of Participants)

	1982	1979	1976	Percent Change 1982/1979	Percent Change 1982/1976
Swimming	102,286	105,441	103,503	- 3.0%	- 1.2%
Bicycling	72,155	69,810	75,015	+ 3.3	- 3.8
Fishing	63,689	59,275	63,901	+ 7.4	- 0.3
Camping	61,592	60,300	58,102	+ 2.1	+ 6.0
Boating	41,973	37,920	35,230	+ 10.6	+ 19.1
Bowling	40,260	43,330	44,434	- 7.0	- 9.4
Physical conditioning*	34,914	na	na	na	na
Jogging/running	34,274	35,727	na	- 4.1	na
Roller skating	30,156	25,359	na	+ 18.9	na
Pool/billiards	29,926	31,937	35,085	- 6.3	- 14.7
Softball	28,033	28,458	27,268	- 1.5	+ 2.8
Tennis	25,450	32,271	29,201	- 21.1	- 12.8
Basketball	25,322	24,048	25,818	+ 5.3	- 1.9
Snow skiing**	19,490	15,397	10,999	+ 26.6	+ 77.2
Table tennis	19,337	26,908	32,215	- 28.1	- 40.0
Hunting	18,646	19,711	20,480	- 5.4	- 9.0
Volleyball	18,365	na	na	na	na
Ice skating	18,032	18,924	25,772	- 4.7	- 30.0
Water skiing	18,032	16,922	14,681	+ 6.6	+ 22.8
Golf	17,367	15,897	16,568	+ 9.2	+ 4.8
Football	14,042	14,300	14,911	- 1.8	- 5.8
Baseball	13,556	15,039	15,670	- 9.9	- 13.5
Racquetball	12,098	10,654	2,784	+ 13.6	+334.6
Motorbiking/motorcycling	12,073	10,511	9,734	+ 14.9	+ 24.0
Sailing	10,615	8,652	7,271	+ 22.7	+ 46.0
Snowmobiling	8,594	8,628	9,204	- 0.4	- 6.7
Soccer	8,031	6,530	na	+ 23.0	na
Handball	2,634	5,578	5,546	- 52.8	- 52.5
Archery	na	5,529	5,477	na	na
Paddle tennis	na	2,431	2,577	na	na
Ice hockey	1,381	1,668	2,669	- 17.3	- 17.2
Platform tennis	na	405	184	na	na
Squash	358	na	na	na	na

* equipment oriented
**includes both down hill and cross country in 1982 and 1979
na = not available

Source: A.C. Neilson Company

CONSUMER MARKETS

Sports Participation & Attendance

A 1982 study underwritten by the Miller Brewing Company and conducted by Research & Forecasts, New York gave an indication of sports participation by sex in that year.

Although the percentage of women participating in any sport was ahead of the percentage of men in only two measured sports, (gymnastics and aerobic dancing), it is widely agreed that the gap is narrowing quickly. This increase in the percentage of women participating in active sports is seen as a tremendous boost to sales of sporting and fitness equipment as well as active apparel.

Participation in Specified Sports by Sex
(Percent of Population aged 15 & over)

	Participate Once a Month or More (In Season)	
	Men	Women
Swimming	54%	47%
Calisthenics	46	32
Jogging	48	38
Bicycling	42	38
Softball/baseball	47	22
Bowling	25	20
Weightlifting	37	10
Basketball	34	15
Football/rugby	33	8
Tennis, racquet sports	30	25
Pool	32	14
Boating	28	22
Table tennis	21	14
Volleyball	19	16
Skiing	17	10
Golf	18	8
Gymnastics	5	15
Soccer	12	6
Handball	6	3
Wrestling	8	3
Horseback riding	9	8
Archery	8	3
Fencing	2	2
Aerobic dancing	2	25
Lacrosse	2	1
Hockey	6	1
Other team sports	8	4

Source: Miller Lite Report on American Attitudes Towards Sports, 1983

CONSUMER MARKETS

Sports Participation & Attendance

An annual study on sports attendance is performed by the research department of the Daily Racing Form.

The latest study covering the year 1983 indicated that better than 55 million people attended auto racing events in that year making it the most popular sport attended. Second place was garnered by Thoroughbred racing while third place was Major League baseball.

The greatest percentage increase in attendance in sports was recorded for college baseball whose attendance rose 14.6% in 1983 while minor league baseball recorded the second highest percentage rise (5.2%).

Sport Attendance by Type of Sport, 1981 - 1983

	1983	1982	1981	% Change 1983/1982	% Change 1983/1982
Auto racing (e)	55,122,327	55,238,330	54,267,000	- 0.2%	+ 1.6%
Thoroughbred racing	50,169,430	51,851,587	51,425,024	- 3.2	- 2.4
Major league baseball	45,540,338	44,587,874	26,544,376*	+ 2.1	na
College football	36,301,877	36,538,637	35,807,040	- 0.6	+ 1.4
College basketball	31,471,135	31,105,948	30,935,117	+ 1.2	+ 1.7
Harness racing (e)	25,615,000	25,766,920	26,274,721	- 0.6	- 2.5
Greyhound racing	22,090,018	21,497,988	21,507,617	+ 2.8	+ 2.7
Minor league baseball	18,560,690	17,636,981	16,559,704	+ 5.2	+ 12.1
NFL football	13,277,222	7,367,438*	13,606,990	na	- 2.4
College baseball	12,896,497	11,258,270	8,370,337	+ 14.6	+ 54.1
NHL hockey	12,028,832	11,769,842	11,692,588	+ 2.2	+ 2.9
NBA basketball	10,244,084	10,716,304	10,308,879	- 4.4	- 0.6

* = strike interrupted season
(e) = estimated
na = not applicable

Source: Daily Racing Form
Survey of Sport Attendance
1981 - 1983

CONSUMER MARKETS

Consumer Expenditures

Total retail sales of sports equipment and all related products, including clothing, footwear, camping gear and hunting equipment, were estimated at $13.6 billion in 1983, according to the National Sporting Goods Association, gaining 13% over the 1982 total. Sales in 1984 are expected to top $15 billion.

The growing interest of U.S. consumers in sports is indicated in annual data compiled by the Bureau of Economic Analysis, U.S. Department of Commerce. In 1983, expenditures for wheel goods, toys and sport equipment, as classified by the Bureau, amounted to over $18 billion (retail value). This represented a gain of 11.3% over 1982 and was 12.3% greater than the total recorded in 1981 in terms of current dollars.

Expenditures for admissions to spectator sports totaled $2.6 billion in 1983 an increase of 8.7% over 1982 and a gain of 14.4% from 1981's total.

Personal Consumption Expenditures Related to Sports & Leisure
(Millions of Dollars)

	1983	1982	1981	% Change 1983/1982	% Change 1983/1981
Admissions to spectator sports	$ 2,578	$ 2,371	$ 2,256	+ 8.7%	+ 14.3%
Wheel goods, toys & sport equipment	18,739	16,830	16,686	+ 11.3	+ 12.3
Wheel goods	16,634	14,811	14,339	+ 12.3	+ 16.0
Boats	1,813	1,741	2,019	+ 4.1	- 15.2
Pleasure aircraft	292	278	328	+ 33.9	- 15.2
Nondurable toys & sport equipment	18,134	15,987	15,188	+ 13.4	+ 19.4

Source: U.S. Bureau of Economic Analysis

RETAIL SALES BY PRODUCT

Bicycles

A strong economy and increased marketing and merchandising efforts by manufacturers combined to boost bicycle sales to 8.9 million units in 1983, up from 6.8 million in 1982 according to the Bicycle Manufacturers Association.

Lightweight bicycles remain the backbone of the bicycle market. In 1983, according to the Association, this category accounted for more than 45% of bicycles sold in the U.S. The BMX (bicycle motorcross) category has been increasing its share of the market since its introduction in 1974. Between 1982 and 1983, the BMX increased its share of the market from 36.8% to 39.8%.

Bicycles (continued)

Emerging demographic patterns are generally favorable for the bicycle industry. A 1982 study of the industry indicated that 31% of all bicycle riders were under 13 years old while another 18% were 25-34 years old. The U.S. Bureau of the Census estimates the total U.S. population age 5 to 13 years will grow to about 34.2 million by 1994, up 15% over the current total of 29.8 million. The population age 25 to 34, however, will grow less than 1%--from 41.0 million in 1984 to a projected 41.156 million in 1994.

Exercise Equipment

Backed by consumers willingness to upgrade to more elaborate equipment than barbells and weights, sales of home exercise equipment skyrocketed to $950 million in 1983, and this was the fastest growing sports/fitness category in 1983.

Although sales of some individual types of home exercise equipment have begun to wane (such as rebounders), a major upswing is continuing in equipment which assimilates the types of equipment currently used in health spas.

The growth in home exercise equipment is expected to continue in the long term--as long as the population continues to show an increasing interest in fitness.

Tennis

The tennis market, which peaked in 1976, has been on the decline ever since. A recent report (Forbes, 12/19/83) indicated that the number of tennis racquets sold in the U.S. had dropped from 9 million in 1976 to 5 million in 1983.

Retailers are currently restructuring their marketing plans in order to contend with the changing market. Most companies are now shying from promotions tended towards new players in favor of campaigns directed to "reentry" players. Analysts believe that the future growth of the tennis market is dependent upon sales to players who left the market after the boom and are now drifting back to it. The promotions to reentry players tend to be of a quality/service nature rather than price cutting promotions.

Racquetball

New court developments and climbing memberships in health clubs with racquetball facilities have curbed the decline in sales of racquetball gear which has been ongoing since the 1979 peak in sports activities.

Much like the tennis market, retailers attempting to stimulate sales are abandoning the entry-level end of the market in favor or mid and upper-priced equipment. With an average of only 50,000 new players a year, marketers do not see the low priced goods as a viable market at the present time.

RETAIL SALES BY PRODUCT

Camping

Sales of camping equipment are estimated at $2.8 billion in 1983, representing approximately 20% of total sporting goods sales in that year. Although sales in this category have not grown dramatically, they have shown slow steady growth over the last few years.

The general popularity of camping has grown in the last few years although it is still far below its peak. The U.S. Department of the Interior reports that in 1983 the number of overnight stays in national parks reached 3.6 million up from 3.4 million in 1979. However this wanes in comparison to the 6 million overnight stays which were recorded in 1965.

Skiing

A total of $812 million was spent on ski apparel, equipment and accessories during the 1982-83 ski season, according to a report by Ski Industries of America. The study, conducted by Sports Marketing and Retail Technology (SMART) found that the 1982-83 season sales marked a decline of 3.9% from the $844.5 million recorded in 1981-82.

Of the $812 million in sales in 1983, $354.9 million was spent on equipment, $380.8 million was spent on apparel and $76.3 million was spent on accessories. Equipment sales in dollars were only slightly higher than 1982's while accessories sales rose by $10 million. Apparel sales marked a decline in dollar volume and percent of the ski market captured between 1982 and 1983.

Most analysts agree that the comeback in ski equipment was due to the superb snow falls which were recorded in 1983. Another prime reason for the growth of the ski market was the influx of athletes from other sports, primarily running, who have turned to skiing as a cardio-vascular activity for the winter months.

Active Apparel

The activewear category which includes a broad definition covering "athleisure" or "street active" wear has been one of the few apparel categories which has registered sustained growth since 1980. Market analysts state that the group has grown from $5 billion in retail sales in 1981 to an estimated $10 billion in 1984.

Activewear has steadily become a more important segment of the sports/fitness complex steadily gaining in its percentage of total sales. This one single category is now estimated to account for approximately one-third of total spending in the sports/fitness category. Many retailers are increasing floor space in their stores to accommodate the increasing sales of activewear.

It is generally agreed that the fastest growing segment of the activewear market is the "street active" area. This category which is designed more for appearance than for functionality is dominated by several firms such as Members-Only, Izod, etc. The functional activewear group is also dominated by several large firms, such as Nike, Addidas, and Puma, etc. The department stores share of the market is seen to be growing as this store type which has traditionally concentrated on the street active market is now seen turning to the participant area. Sporting goods stores, on the other hand, are broadening their lines to include street active as well as functional sportswear.

RETAIL SALES BY PRODUCT

Active Apparel (continued)

Analysts see the growth of activewear continuing into the future as new fashion orientation for the category is found. The activewear category is constantly finding acceptance as a style of dress in areas which were previously closed to the category (office, dining, etc.). As the acceptance of the category grows so should sales continue to climb.

Athletic Footwear

The U.S. retail market for athletic footwear of all types, valued at over $2 billion has matured, and the industry can no longer reasonably expect the sharp escalation in sales which has characterized previous years. According to the U.S. Bureau of the Census, apparent consumption of nonrubber athletic footwear represented 11.2% of 1983's total nonrubber footwear consumption, down from 12.5% in 1982.

According to the National Sporting Goods Association, retail sales of athletic footwear reached $2.2 billion in 1983, a 15% gain over 1982. Sales are predicted to soften to a more modest 7% growth rate by the end of 1984 according to this same group. The two major reasons for the tremendous growth in 1983 were customer trade-ups and price increases, as the average price paid for all sports footwear rose 4% between 1982 and 1983. Sales of gym shoes/sneakers declined in 1982 and 1983, but sales of tennis shoes picked up last year, according to the NSGA. Currently a decided trend is seen back to sneakers for street wear, rather than running shoes.

In terms of pairs, nonrubber athletic footwear consumption (or market supply) was reported at 102.5 million pairs, based on preliminary data for 1983, which represented a gain of less than 1% compared with the 1982 total of 101.6 million pairs.

Imports, which account for nearly 70% of total U.S. supply of athletic footwear of all types, remain a major problem to domestic manufacturers. However, domestic companies have the distinct advantage through their ability to more quickly fill orders and to respond to the fast-changing, demanding market.

Based on market tracking studies by Footwear Market Index (FMI), almost half of all boys' and girls' footwear purchases in 1983 were for tennis shoes/sneakers. Other results from FMI are shown below.

RETAIL SALES BY PRODUCT

Athletic Footwear

Athletic Footwear Purchases, 1983

	Men's	Women's	Boys' & Girls'
Projected footwear purchases (millions of pairs)*	205.4	419.5	54.3
Percent of total:			
Athletic (jogging shoes, etc.)	16.6%	7.1%	18.4%
Tennis shoes/sneakers	20.3	10.2	49.7

* Includes purchases of all types of footwear.

Source: Kormos, Harris, & Associates, Nashville, Tenn.
Footwear Market Index (FMI)

However, a big percentage of athletic footwear is purchased for other than active sports participation. FMI data for 1983 indicate that only 25% of athletic footwear purchased for adults in 1983 was primarily for active sports use; among boys and girls, less than 10% of purchases were for active sports. A natural result has been the development of athleisure footwear, which offers an active look plus wanted fashion features. Consumers have cut back on the use of athletic shoes for casual wear and street active, or athleisure footwear, represents the growth market and is becoming the dominant product among athletic footwear suppliers. This is bringing about changes in distribution patterns.

Bicycles

The Bicycle Manufacturers Association reports that Discounters are the fastest growing outlet in the retail bicycle market, increasing their share by 2.9 percentage points between 1982 and 1983.

Domestic Manufacturer Sales by Type of Outlet, 1983

	1983	1982
Total	100.0%	100.0%
Bicycle shops	28.5	30.7
Discount houses	25.7	22.8
National distributors	23.9	25.2
Regional chains	16.8	17.2
Wholesaler/jobber	5.1	4.1

Domestic Bicycle Shipments by Type of Hub, 1982, 1983

	1983	1982
Domestic Shipments, total	100.0%	100.0%
Coaster brake	59.9	57.8
10+ speed	34.0	34.9
5 speed	0.1	0.3
3 speed	6.0	7.0

Source: Bicycle Manufacturers Association of America,
The 1983 Bicycle Market in Review.

RETAIL SALES BY STORE TYPE

A complete census of retail trade, including sales of broad classifications of merchandise lines, is compiled by the U.S. Bureau of the Census every five years. Information based on the latest census, covering operations in 1982 is currently being released by the Bureau in preliminary form, to be followed by final data in 1985.

The following information on sporting goods sales (including bicycles, athletic equipment and supplies) has been issued as of August 1984. These figures are subject to revision when the final reports are released.

Sporting Goods Sales in Specified Retail Outlets, 1982

Store Type	Number of Establishments*	Sporting Goods Sales(p) Mil. $	Sporting Goods Sales(p) % To Total Store
Sporting goods/bicycle shops	20,129	$5,671.8	75.1%
Department stores**	10,035	2,248.7	2.1
Variety stores	10,814	220.2	2.8
Hardware stores	19,611	276.4	3.3
Hobby, toy & game shops	7,680	185.0	5.7
Mail order houses	7,360***	422.5	3.8

(p) preliminary
* Total number of establishments (locations) in specified classifications, not all of which may sell sporting goods
** Not including leased departments. Discount stores which meet the official definition of a department store are included in this classification.
*** Establishments with payroll.

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade (preliminary reports)

The U.S. Bureau is currently compiling information on consumer expenditures by major product (updating the 1972-1973 Consumer Expenditure Survey). Detailed data should be released by the BLS in the Spring of 1985, according to the present schedule. This will contribute some information on consumer spending for products in the sporting goods/fitness area.

Sporting Goods Stores

According to a preliminary report based on the 1982 Census of Retail Trade, the number of sporting goods and bicycle shops in the U.S. with paid employees rose dramatically between 1977 and 1982 to a total of 20,129. The number of employees rose 37.4% to 106,199. Annual payroll between 1977 and 1982, gained 72.9% during the five year period on a current year basis.

RETAIL SALES BY STORE TYPE

Profile of Sporting Goods & Bicycle Shops, 1977, 1982

	1982(p)	1977	% Change 1982/1977
Number of establishments*	20,129	17,235	+ 16.8%
Number of paid employees	106,199	77,269	+ 37.4
Annual payroll ($1,000)	$924,756	$534,774	+ 72.9

(p) preliminary. Figures are subject to change in final reports.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade
Preliminary Reports RC82-I-28(P)

Total retail sales in sporting goods and bicycle shops, which rose 83.4% between 1972 and 1977, continued their rise through 1982 according to the Commerce Department. In 1982, retail sales in this one outlet type totaled $7,552,371,000, 80.2% higher than the total registered in 1977. Sales per establishment also rose dramatically between 1977 and 1982 rising 52.7% to an average of $373,708. (All data are in current dollars for the years specified and have not been adjusted for price changes. Inflation is, of course, an important factor in evaluation gains in dollar sales.)

Retail Sales of Sporting Goods & Bicycle Stores 1972, 1977, 1982

	1982(p)	1977	1972	Percent Change 1982/1977	Percent Change 1977/1972
Total sales ($1,000)	$7,552,371	$4,190,020	$2,283,851	+ 80.2%	+ 83.4%
Sales per establishment	373,708	243,111	184,837	+ 53.7	+ 31.5

(p) preliminary. Figures are subject to change in final reports.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade
Preliminary Reports, RC82-I-28(P)

Data on the sporting good and bicycle shop outlets by employment size in 1981 indicates that the vast majority (83.9%) had fewer than 10 employees. Only 0.1% of all sporting goods and bicycle shops in 1981 had more than 100 persons on their payrolls.

Current information available through the Census Bureau's monthly retail sales report shows sporting goods/bicycle shop sales up 12% in the first five months of 1983 compared with the same 1983 period. For the year 1983/1982 sales were up 9.7%.

RETAIL SALES BY STORE TYPE

Sporting Goods Stores

Sporting Goods & Bicycle Shops By Employee Size, 1981

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil.$	% of Total
Sporting goods & bicycle shops, total	15,957	100.0%	95.3	100.0%	$813.3	100.0%
By establishment size:						
Under 10 employees	13,393	83.9	44.4	46.6	392.8	48.2
10 - 19 employees	1,802	11.3	24.9	26.1	205.7	25.3
20 - 49 employees	679	4.3	19.8	20.8	156.8	19.3
50 - 99 employees	71	0.4	4.6	4.8	41.3	5.1
100 or more employees	12	0.1	1.6	1.7	16.7	2.1

Source: U.S. Bureau of the Census,
County Business Patterns.

The growing importance of apparel and footwear to the sporting goods industry is clearly evident when retail sales of sporting goods bicycle shops are presented. Between 1977 and 1982, the percentage of sales credited to sporting goods fell 7.6% to 75.1% of total retail sales in these stores. At the same time, apparel and footwear sales climbed from 11.6% of sales to 19.2% exactly filling the gap.

Distribution of Sales by Merchandise Line in Sporting Goods Stores & Bicycle Shops, 1982, 1977

(Percent Distribution)

	1982	1977
Total Sales	100.0%	100.0%
Sporting goods	75.1	82.7
Men's & boys' wear, exc. footwear	7.2	4.3
Women's & girls' wear, exc. footwear	7.2	4.4
Footwear	4.8	2.9
Recreational vehicles	0.2	0.2
Other merchandise	0.6	0.8
Non-merchandise receipts	2.5	2.5
All other receipts	2.4	2.2

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade
Preliminary Industry Reports,
Sporting Goods Stores and Bicycle Shops
RC82-I-28(P) May 1984

RETAIL SALES BY STORE TYPE

Sporting Goods Stores

A list of the leading sporting goods dealers in the U.S. was published in Sport-Style as noted below.

Estimated Sales of Leading Sporting Goods Retailers, 1980-1982
(Millions of Dollars)

	1983	1982	1981	1980
Herman's	$317**	$275**	$230**	$220
Oshman's	283***	247***	216***	145
Foot Locker	250*	180*	200*	102
L.L. Bean	237**	225**	172**	120
Big Five	130*	120*	120*	99
Eddie Bauer	119*	107*	100**	80
Sunset Sports	110*	100**	100*	88
Land's End	90*	80**	na	na
Sport Mart	90*	na	na	na
REI	80***	67**	55	49

na = not available
* market estimate
** statement from corporate officer
*** annual report

Source: SportStyle (Fairchild Publications)
(August 6, 1984; May 23, 1983; April 19, 1982;
April 20, 1981)

Department Stores

In recent years department stores have allocated increasing footage on their sales floors to athletic departments, including functional sportswear, and athleisure and street active wear have become more important in regular sportswear departments.

According to preliminary results found in the 1982 census of retail trade (U.S. Bureau of the Census), sporting goods accounted for 2.1% of total department store sales in that year. Activewear's share of the 38.2% of total store sales represented by women's, men's, girls', boys' apparel and footwear has not been reported, but is probably significant. (Total department store sales in 1982 amounted to $107.9 billion; in 1983, $116.7 billion, according to Census Bureau monthly retail sales reports).

Typical operating results in department stores in 1982, according to the National Retail Merchants Association, showed a strong performance in active sportswear in junior sizes (women's), with sales up a median 42%. Women's and misses' active sportswear and men's also registered gains, but sales of sporting goods departments were reported to be down in the typical store.

RETAIL SALES BY STORE TYPE

Department Stores

The NRMA reported that sporting goods contributed a typical, or median, 0.7% of sales in their reporting department stores. This is in contrast with the Census Bureau's overall figure for all department stores of 2.1%.

Selected Typical (Median) 1982 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Women's & Misses' Active Sportswear*	Junior Active Sportswear*	Men's Active Sportswear*	Sporting Goods
Net sales % change from last year	+ 9.1%	+ 42.2%	+ 10.1%	- 0.7%
Sales % to total store	1.1	0.4	0.7	0.7
Net sales % of merchandising division	4.7	1.9	5.4	11.3
$ sales per square foot of selling space	$158.8	$ 83.6	$207.6	$62.0
Cumulative markon, %	51.4%	52.3%	50.7%	44.1%
Gross margin, % of sales including cash discounts	47.0	47.7	44.7	34.8
Markdowns, retail, % of sales	15.7	18.1	13.7	16.5
Returns, % of sales	9.0	6.8	10.0	7.2
Number of stock turns	3.8	4.0	3.1	1.9
Sales people's salaries, % of sales	6.0	4.9	7.0	8.9
Sales promotion, % of sales	2.8	3.3	3.3	3.7

*Active sportswear includes swimwear, beachwear and accessories and all other summer playwear; ski jackets, pants and other winter sportswear.

Source: National Retail Merchants Association, Merchandising & Operating Results (1983 Edition).

RETAIL ADVERTISING

Monthly Distribution of Retailers' Newspaper Advertising Linage

Month	Bicycles	Sporting Goods
January	1.7%	3.6%
February	3.7	4.0
March	7.2	6.6
April	10.3	8.8

(continued)

RETAIL ADVERTISING

Monthly Distribution of Retailers' Newspaper Advertising Linage
(continued)

	Bicycles	Sporting Goods
May	13.2%	12.9%
June	12.8	10.9
July	6.3	7.8
August	9.5	8.7
September	6.7	7.7
October	6.2	9.0
November	10.9	9.1
December	11.5	10.9
Total linage	100.0%	100.0%

Source: Newspaper Advertising Bureau,
1984 Newspaper Advertising Planbook

CONSUMER PRICE INDEX

The rate of increase of consumer prices in the sporting goods industry has been steadily declining since 1981. Between 1982 and 1983, the rate of increase in consumer prices of sporting goods and equipment was only 2.5%, well below the national average of 3.8%. Two of the measured categories, indoor and warm weather sport equipment and bicycles, actually registered declines in the overall consumer price level while sport vehicles and other sports equipment showed rises.

As of May 1984, the price level for all sporting goods and equipment was 3.6% over the index a year earlier. The price level for indoor and warm weather sports equipment was down 2.7%.

Consumer Price Indexes for Specified Sporting Goods (All Urban Consumers)
(December 1977 = 100, unless otherwise indicated)

	May	Annual Averages			Percent Change	
	1984	1983	1982	1981	1983/1982	1982/1981
All items*	309.7	297.4	286.6	272.3	+ 3.8%	+ 5.3%
Sporting goods & equipment	138.0	127.8	124.7	120.0	+ 2.5	+ 3.9
Sport vehicles	143.0	127.0	122.7	118.9	+ 3.5	+ 3.2
Indoor & warm weather sport equipment	117.3	117.1	118.0	116.5	- 0.7	+ 1.3
Bicycles*	200.8	199.2	199.3	192.1	- 0.1	+ 3.7
Other sporting goods & equipment	134.6	132.8	128.8	123.0	+ 3.1	+ 4.7

* 1967 = 100
(p) preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics

CONSUMER BUYING HABITS

Active Sportswear

In a survey undertaken in September 1983 by R.H. Bruskin Associates for Daily News Record (September 29, 1983), a fifth of a nationally representative sample of 500 men said that in the 12 months following the survey purchases of active sportswear items would be greater than in the preceding 12 months. Almost a third (32.6%) of the men and women aged 18-34 years intended to raise their level of spending on active sportswear over this period.

Intention to Purchase Active Sportswear Compared With The Previous 12 Months

	Intend to Purchase:						
	Much More	Somewhat More	About the Same	Somewhat Less	Much More	None	Don't Know
Total	8.2%	13.6%	52.4%	9.1%	11.4%	4.2%	1.1%
By Sex							
Male	7.6	14.9	56.7	7.0	8.2	4.1	1.5
Female	8.8	12.3	48.5	11.1	14.2	4.3	0.8
By Age							
18 - 24 years	15.6	16.6	48.7	8.6	9.6	1.0	--
25 - 34 years	11.5	21.7	46.3	10.8	8.3	1.0	0.5
35 - 49 years	5.7	15.9	60.0	7.1	8.4	1.9	1.0
50 - 64 years	4.1	7.3	61.2	7.7	15.2	3.3	1.3
65 years & older	3.5	4.6	45.7	10.9	14.8	17.4	3.1
By Income							
Under $15,000	8.1	6.3	47.1	11.8	16.6	8.4	1.7
$15,000-$19,999	9.9	10.7	50.4	10.0	12.8	6.3	--
$20,000-$29,999	10.0	19.2	53.9	7.5	7.6	1.1	0.6
$30,000-$39,999	6.3	14.1	61.8	7.6	9.4	0.7	--
$40,000 & over	4.9	26.0	59.2	4.1	2.6	2.5	0.8
By Region							
Northeast	8.4	15.7	46.7	8.6	13.4	6.0	1.1
North Central	4.3	13.7	55.0	11.2	10.9	4.1	0.9
South	11.0	11.9	54.4	8.6	10.7	2.2	1.2
West	8.5	13.9	52.0	7.8	10.7	5.6	1.5

Source: R. H. Bruskin Associates,
Daily News Record, September 29, 1983.

CONSUMER BUYING HABITS

Information on purchase patterns for men's and women's active sportswear covered in the following data for the years 1982 and 1983 has been supplied by NPD Special Industry Services, one of the NPD Group of Marketing & Research Companies, Port Washington, New York. The statistics are based on reports from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families.

Active Sportswear - Men's

NPD panel purchases in this activewear category were off 21.0% in 1983 compared with the previous year, but the amount spent on sweatpants, joggers and jumpsuits declined by 1.5% over the same period.

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	11.1	20.1	9.3	26.2
Mass merchandisers (Sears/Penneys/Wards/K-mart)	53.9	36.9	39.2	36.4
Discount stores	9.0	35.6	5.3	26.6
Specialty stores	20.8	4.2	42.6	5.6
All other outlets	5.3	3.2	2.8	5.3

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $14.00	16.0	34.3	5.0	14.2
$14.00 - $19.99	39.8	28.6	27.8	25.2
$20.00 & over	44.1	37.0	67.2	60.6

Purchases of Men's Sweatpants, Joggers & Jumpsuits by Fibers, 1982

	1982	
	Units	Dollars
Total	100.0%	100.0%
Polyester/cotton blend	74.9	71.0
100% polyester & other polyester blends	9.8	11.8
100% cotton	15.2	17.3

NOTE: 1983 data by fiber not shown due to a significant percentage of non-responses.

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Men's

As reported by NPD, men's swimwear sales in 1983 dipped 7.1% in dollars and 8.7% in the quantity purchased compared with 1982.

Purchases of Men's Swimwear by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	30.7	24.7	36.3	30.5
Mass merchandisers (Sears/Penneys/Wards/K-mart)	25.3	30.3	23.3	28.7
Discount stores	17.9	16.0	13.6	10.2
Specialty stores	10.6	15.0	12.2	17.6
All other outlets	15.1	11.9	14.2	11.3
No answer	0.4	2.0	0.4	1.7

Purchases of Men's Swimwear by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $7.00	26.9	41.8	13.3	22.4
$7.00 - $10.99	42.2	24.1	38.9	20.4
$11.00 & over	30.9	34.2	47.8	55.2

Purchases of Men's Swimwear by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	3.4%	3.7%	4.4%	5.5%	17.2%	27.2%	19.5%	12.8%	2.8%	1.8%	1.3%	0.4%	100.0%
1982	1.8	4.0	7.4	6.2	14.6	27.5	25.9	5.8	3.9	0.3	0.4	2.1	100.0
Dollars:													
1983	3.3	5.8	4.3	5.5	16.3	28.2	16.3	14.2	2.7	1.3	1.9	0.1	100.0
1982	2.5	5.9	6.1	6.8	17.6	31.8	18.2	6.5	2.2	0.4	0.02	1.8	100.0

NPD member households reported purchasing 25.7% more sweatshirts in 1983 than the prior year. These sweatshirts had a total retail value 32% higher than in 1982.

Purchases of Men's Sweatshirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	16.5	14.7	19.5	15.1
Mass merchandisers (Sears/Penneys/Wards/K-mart)	32.5	41.1	31.6	41.7
Discount stores	26.7	20.3	22.1	18.3
Specialty stores	9.3	11.1	12.1	12.7
All other outlets	14.6	10.8	14.4	10.7
No answer	0.4	2.0	0.4	1.4

(continued)

CONSUMER BUYING HABITS

Active Sportswear-Men's

Purchases of Men's Sweatshirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $7.00	35.6	40.6	18.2	21.3
$7.00 - $10.99	34.9	32.8	33.3	32.6
$11.00 & over	29.6	26.6	48.4	46.1

Purchases of Men's Sweatshirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	7.8%	5.3%	4.8%	4.6%	2.8%	2.1%	2.5%	4.0%	5.6%	11.2%	18.6%	30.7%	100.0%
1982	6.4	8.0	6.6	3.5	2.8	3.0	4.4	4.3	4.7	10.2	17.1	29.0	100.0
Dollars:													
1983	6.3	3.9	4.7	3.4	2.6	2.3	2.0	3.8	5.1	11.6	19.6	34.7	100.0
1982	6.1	5.3	5.3	2.6	2.8	3.5	3.7	3.8	4.8	8.6	19.2	35.2	100.0

Source: NPD Special Industry Services

Activewear - Women's

As reported by NPD, women's swimwear sales in 1983 dipped 8.3% in dollars and 4.2% below the quantity purchased in 1982.

Purchases of Women's Swimwear by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	31.4	24.0	41.4	32.2
Mass merchandisers (Sears/Penneys/Wards/K-mart)	25.9	28.9	20.1	22.8
Discount stores	10.8	11.3	6.9	8.1
Specialty stores	22.4	25.9	23.6	27.8
All other outlets	9.1	9.4	7.3	8.4
No answer	0.4	0.5	0.7	0.7

Purchases of Women's Swimwear by Price Point, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $11.99	28.4	32.6	11.8	13.3
$12.00 - $19.99	33.4	29.6	28.1	25.4
$20.00 - $27.99	17.6	18.2	21.6	23.3
$28.00 & over	20.6	19.6	38.5	38.0

(continued)

CONSUMER BUYING HABITS

Active Sportswear - Women's

Purchases of Women's Swimwear by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	1.6%	2.9%	6.0%	10.4%	15.6%	25.3%	22.9%	10.9%	1.9%	1.0%	0.8%	0.9%	100.0%
1982	1.5	3.8	7.2	6.8	16.9	20.7	31.0	8.0	3.0	0.8	0.2	0.1	100.0
Dollars:													
1983	1.3	3.5	6.2	10.1	16.5	26.3	22.3	10.8	1.3	0.7	0.4	0.9	100.0
1982	1.6	3.9	8.2	7.8	16.6	20.8	30.6	8.0	1.6	0.5	0.5	*	100.0

* Less than 0.1%

Source: NPD Special Industry Services

Dollar expenditures of women's shorts and tennis dresses increased 18.5% in 1983, as the quantity purchased by NPD households rose 8.7%.

Purchases of Women's Shorts/Tennis Dresses by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0
Department stores	21.4	19.7	27.2	27.7
Mass merchandisers (Sears/Penneys/Wards/K-mart)	27.9	32.5	20.6	25.5
Discount stores	18.9	17.4	14.3	13.7
Specialty stores	20.0	20.4	26.0	22.9
All other outlets	11.3	9.5	11.3	9.6
No answer	0.6	0.6	0.6	0.6

Purchases of Women's Shorts/Tennis Dresses by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $4.99	36.1	46.9	14.7	21.5
$5.00 - $10.99	45.1	36.1	45.3	39.7
$11.00 & over	18.8	17.0	40.0	38.8

Purchases of Women's Shorts/Tennis Dresses by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	1.3%	1.9%	7.4%	12.7%	19.5%	25.6%	19.7%	6.6%	2.5%	1.7%	0.6%	0.4%	100.0%
1982	1.1	3.5	7.6	13.5	23.9	19.4	19.4	6.3	3.1	1.1	0.4	0.7	100.0
Dollars:													
1983	1.4	2.9	8.4	13.0	19.4	23.7	19.9	6.3	2.7	0.8	0.9	0.6	100.0
1982	1.2	3.2	9.3	14.0	24.9	19.9	16.8	6.4	2.1	1.1	0.4	0.7	100.0

Source: NPD Special Industry Services

CONSUMER BUYING HABITS

Active Sportswear - Women's

In 1983, women's sweatshirt purchases made by NPD panel members climbed 43.8% in dollars and 40.0% in units versus a year earlier.

Purchases of Women's Sweatshirts by Store Type, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Department stores	16.0	14.1	19.3	17.4
Mass merchandisers (Sears/Penneys/Wards/K-mart)	31.0	34.6	28.3	31.4
Discount stores	18.0	19.0	14.5	15.4
Specialty stores	17.6	18.1	20.4	20.0
All other outlets	16.3	13.8	16.5	15.3
No answer	1.0	0.4	1.1	0.6

Purchases of Women's Sweatshirts by Price Points, 1982, 1983

	Units		Dollars	
	1983	1982	1983	1982
Total	100.0%	100.0%	100.0%	100.0%
Less than $7.99	45.3	47.2	26.5	27.9
$8.00 - $13.99	36.8	36.8	39.3	40.5
$14.00 & over	17.8	16.0	34.1	31.5

Purchases of Women's Sweatshirts by Months, 1982, 1983

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Units:													
1983	6.2%	7.7%	5.9%	4.2%	4.5%	3.7%	6.1%	8.8%	7.9%	11.6%	13.8%	19.5%	100.0%
1982	6.3	6.0	8.4	4.1	3.6	3.0	6.1	9.6	10.2	13.0	13.0	16.7	100.0
Dollars:													
1983	5.7	7.6	5.6	3.9	4.1	3.6	5.0	9.8	8.0	11.1	14.9	20.5	100.0
1982	4.9	4.7	8.7	3.6	3.6	2.5	4.7	10.2	10.2	12.4	15.4	10.0	100.0

Source: NPD Special Industry Services

FAIRCHILD FACT FILES AVAILABLE FOR 1984

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1983 Edition available now -- 1984 Edition will be available in February, 1985)

DEPARTMENT STORE SALES: Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1983 Edition available now -- 1984 Edition will be available in January, 1985)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data. (November)

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. ($15.00)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered. (October)

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included. (May)

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits. (Special Fact File for 1983, $15.00)

RETAILING/MERCHANDISING TRENDS: Covers trends in sales of specific retail outlet types, competitive developments in retailing (such as off-price retailing, franchising, designer names, private labels). Trends in number of outlets by size; regional developments in retailing. (December)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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